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OREGON STATE UNIVERSITY
YEAR SEVEN SELF-EVALUATION REPORT

Submitted to
THE NORTHWEST COMMISSION ON COLLEGES AND UNIVERSITIES
FEBRUARY 2019

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INSTITUTIONAL OVERVIEW

Founded in 1868 as Oregon’s land grant institution, Oregon State University serves the state, the nation and the world as a premier 21st-century research university. OSU is committed to exceptional research, discovery, innovation and engagement — and to integrating its research and engagement mission with the delivery of a high-quality, globally relevant and affordable education for the people of Oregon and beyond. OSU is one of only two land, sea, space and sun grant universities in the U.S. and is the only university in Oregon to have earned both Carnegie Classifications for Very High Research Activity and Community Engagement.

OSU is one of seven public universities in Oregon. Since 2014, OSU has been served by an independent institutional Board of Trustees, appointed by the governor. The Board of Trustees of Oregon State University governs Oregon’s only university with a statewide presence and helps guide OSU’s mission to serve the state and the needs of its citizens in a growing global economy. The university has been continuously accredited since 1924 and is currently accredited by the Northwest Commission on Colleges and Universities. Many of the university’s degree programs are also approved by other specialized accrediting associations.

OSU welcomes an increasingly diverse student body of more than 32,000 students, including over 5,000 graduate students, from across Oregon, all 50 states and more than 100 countries. The university continues to serve its land grant mission, with Oregon residents making up over 71 percent of degree-seeking undergraduates on the Corvallis campus and 57.4 percent overall. Domestically underrepresented students make up more than 25 percent of OSU’s overall enrollment, and international students represent 11 percent of total enrollment.

Students can choose from more than 200 undergraduate and 100 graduate degree programs, including more than 50 degree and certificate programs offered online. OSU has a national and international reputation for its programs in creative writing, public policy, forestry, oceanography, mycology, marine biology, agriculture, robotics and natural resources. Programs are offered through 11 colleges, the Graduate School and the Honors College, one of only a handful of degree-granting honors programs in the U.S. OSU maintains a rigorous focus on academic excellence, particularly in three signature areas: the science of sustainable Earth ecosystems, health and wellness, and economic prosperity and social progress.

The university’s 570-acre main campus is located in the city of Corvallis, a vibrant college town of nearly 58,000 in the heart of Western Oregon’s Willamette Valley. Corvallis consistently ranks among the safest, most highly educated and greenest small cities in the nation.

In 2001, OSU established a presence in Bend, Oregon, and the OSU-Cascades branch campus expanded to a four-year university when it welcomed its first freshman class in 2015. OSU-Cascades brings quality instruction to Central Oregon students as the only baccalaureate and graduate degree-granting institution in the region. Enrollment at OSU-Cascades has grown to over 1,200 students as of fall 2018, with 67 percent of students from Central Oregon and 31 percent of students who are the first in their family to attend college.

OSU also offers online degrees and courses through the nationally ranked Oregon State Ecampus. More than 1,200 online courses are available to learners throughout the state, the nation and the world. In fall 2018, OSU expanded its long-standing service to the Portland region by opening a center in downtown Portland to support the hybrid delivery of educational programs (online and face-to-face), along with continuing education and outreach and engagement.
OSU programs and faculty are located throughout Oregon. OSU operates 15 Agricultural Experiment Stations, including the Food Innovation Center in Portland and the OSU Seafood Laboratory in Astoria, 35 county Extension offices, the Hatfield Marine Science Center in Newport, and the Oregon Forest Research Laboratory, with 14,000 acres of college forests serving as field classrooms and laboratories.

As Oregon’s largest public research university, with $382 million in external research funding in 2018, Oregon State’s impact reaches across the state and beyond. The university is a significant contributor to Oregon’s economy and economic development, and its signature areas are a close fit with the state’s needs and priorities. The university’s gross economic impact in 2017 totaled $2.71 billion. With a vision of leadership among land grant universities in the integrated creation, sharing and application of knowledge for the betterment of humankind, Oregon State University produces graduates, scholarship and solutions that achieve maximum positive impact on humanity’s greatest challenges.
PREFACE

Brief Update on Institutional Changes since the Institution’s Last Report

The dates of the last reports to the commission were the 2014 – Year 3 Self-Evaluation Report on March 3, 2014 and the Ad Hoc Self-Evaluation Report on October 19, 2015. Oregon State University has continued many of the initiatives summarized in those reports. The university has also engaged in a number of new activities to help advance its mission and core themes and directly address accreditation recommendations.

Governance

At the time of the last report, it was noted that OSU was transitioning from the primarily state-run Oregon University System that had a State Board of Higher Education to a university with its own independent governing board. Under the previous system, the state board acted as a coordinating and advocacy board for the entire university system, including making the case for state appropriations and coordinating the allocation of resources to the member campuses.

As of July 1, 2014, the state board and the Oregon University System ceased to exist, and the Oregon State University Board of Trustees, as delineated by House Bill 3120, assumed governance oversight of OSU. The OSU Board of Trustees oversees the affairs of the university, including determining the mission of the university; approving the strategic plan and monitoring its effectiveness; reviewing and approving the annual university budget; and preserving and protecting the university’s autonomy, academic freedom and the public purposes of higher education.

The Oregon Higher Education Coordinating Commission (HECC), appointed by the governor, coordinates salient operational aspects of Oregon’s public higher education institutions — including community colleges — with a focus on budget requests, the distribution of state appropriations and significant changes in an institution’s mission. Collaboration among the presidents of Oregon’s seven public universities continues through voluntary participation in the Oregon Council of Presidents, an association focused primarily on state financial support for higher education. Since 2014, the presidents have coordinated submission to the HECC of common operating budget requests and the general prioritization of capital budget requests. OSU President Edward Ray, the longest-serving president among the seven public universities, is serving as the convener of the council during the 2018-19 academic year.

Strategic Planning

OSU has a long history of strategic planning. Starting in 2004, the university began developing plans on a systematic five-year basis. Strategic Plan (SP) 2.0 was completed in 2009 and SP3.0 in 2014. In 2018, the university embarked on the development of SP4.0. As will be referenced throughout this report, the 2019-23 strategic plan — SP4.0: Transformation, Excellence and Impact — identifies the goals that will drive the university closer to the distinctive strengths it aspires to have achieved by the year 2030.

SP4.0 emphasizes that the foundational pursuits of research preeminence, innovation, transformative education, outreach and engagement, global impact, access, affordability, diversity, inclusion and justice underpin OSU’s mission and vision; guide the university’s priorities and actions; and are visible in the university’s achievements. SP4.0 continues a commitment to maintaining a rigorous focus on academic
excellence, particularly in three signature areas: the science of sustainable Earth ecosystems, health and wellness, and economic prosperity and social progress. The plan also identifies inclusive excellence as the university's guiding value and affirms OSU's commitment to the ideal that higher education is a public good that should be accessible to all learners. Four goals and 20 actions will guide OSU's delivery of exceptional teaching, research and engagement as Oregon's land grant and statewide university over the next five years.

**Administrative Changes**

Since the last reports, Oregon State has welcomed a number of new academic and administrative leaders.

In July 2016, Sabah Randhawa left his position as provost and executive vice president to begin service as president of Western Washington University. During his 11 years as provost of OSU, Randhawa led a period of extraordinary growth, including increasing student enrollment, expanding educational programs and building a number of new facilities. He was succeeded by Ron Adams, who served as interim provost and executive vice president between July 2016 and February 2017. Edward Feser, who previously served as interim vice chancellor for academic affairs and provost at the University of Illinois at Urbana-Champaign, assumed the role at the end of February 2017.

Other senior leaders reporting to the president include Charlene Alexander (vice president and chief diversity officer), Scott Barnes (vice president and director, intercollegiate athletics), Steven Clark, (vice president, university relations and marketing), Debbie Colbert (secretary of the board), Rebecca Gose (general counsel), Michael Green (vice president and chief financial officer), Kim Kirkland (executive director, equal opportunity and access), Jock Mills, (director, government relations), Patti Snopkowski, (chief audit, risk and compliance executive), Sue Thiess, (university ombuds), and Irem Tumer (interim vice president, research).

New deans include Scott Ashford (College of Engineering), Roy Haggerty (College of Science), Roberta Marinelli (College of Earth, Ocean, and Atmospheric Sciences), Mitzi Montoya (College of Business), Javier Nieto (College of Public Health and Human Sciences), Alan Sams (College of Agricultural Sciences) and Susan Tornquist (Carlson College of Veterinary Medicine). Toni Doolen, dean of the Honors College, also assumed the position of dean of the College of Education in 2017. Anthony Davis (College of Forestry) and Mark Leid (College of Pharmacy) are serving as interim deans while searches for the next permanent deans are underway.

New senior leaders reporting to the provost include Jack Barth (executive director, Marine Studies Initiative), Susan Capalbo (senior vice provost, faculty affairs), Rich Duncombe (director, Impact Studio), Alix Gitelman (vice provost, undergraduate education), Kendra Sharp (senior advisor to the provost for international affairs), Phillip Mote (vice provost and dean of the Graduate School) and Lisa Templeton (associate provost, Ecampus). Noah Buckley (enrollment management) is serving as interim associate provost, and Jon Dolan (information and technology) and Dan Larson (student affairs) are each serving as interim vice provost for their respective areas while searches for permanent leadership are underway.

**Student Enrollment and Infrastructure Growth**

Over the last five years, enrollment has continued to grow. Overall, fall term enrollment grew by 107 over 2017, making OSU the largest university in the state for the fifth consecutive year. Enrollment at the university’s main campus in Corvallis has increased to 24,290, with 71.2 percent of undergraduate enrollment coming from Oregon residents. While the number of international students has more than tripled since 2007, enrollment dropped slightly in 2018 to 11 percent from 11.5 percent the previous year. Student diversity has increased due to the continued growth in domestically underrepresented students, who now make up more than 25 percent of overall enrollment.
The growth in enrollment in Corvallis and Bend has been supported by capital growth and renewal on the university’s main campus. The following projects, some of which were previously noted in reports to the commission, have been completed since the 2014 report:

- **Tebeau Hall (2014):** A five-floor, 85,000-square-foot student residence hall houses about 300 students.

- **Learning Innovation Center (LInC) (2015):** A state-of-the-art classroom learning environment that introduced new styles of learning spaces to support collaboration and student participation, including parliament and in-the-round classroom designs.

- **Johnson Hall (2016):** The 58,000-square-foot building serves primarily as home to the School of Chemical, Biological and Environmental Engineering. It also houses college-level programs geared toward student recruitment, retention and success.

Additionally, several new projects are now underway:

- **Oregon Forest Science Complex:** A state-of-the-art, 15,000-square-foot facility to house forestry and natural resources degree programs. Construction is underway with a completion date of fall 2019.

- **Arts and Education Complex:** In 2017, OSU received a $25 million gift to construct an arts and education complex that will bring together music, theater, digital communications and the visual arts. With state matching funds and additional fundraising, this is estimated to be a $70 million project. The new arts complex is expected to open in 2022.

- **Gary R. Carlson College of Veterinary Medicine:** In 2018, OSU received a $50 million commitment, the largest in the school’s 150-year history, for the College of Veterinary Medicine. The gift will support expansion of the animal hospital and aid in recruitment and retention of students and faculty. Construction of the Magruder Hall expansion and a two-story addition to the Lois Bates Acheson Veterinary Teaching Hospital are now underway. The college received a separate $6.5 million gift in December 2018.

- **Marine Studies Building:** In 2018, OSU began construction of the 72,000-square-foot Marine Studies Building at the Hatfield Marine Science Center in Newport. This new building will significantly bolster OSU’s half century of excellence in marine sciences. The state-of-the-art facility will give students, faculty, researchers and the community a space for learning, innovation and growth. This structure will also help OSU achieve the goals of the Marine Studies Initiative: transformative education centered on marine studies, leadership in transdisciplinary marine research, and increasing societal impact in Oregon and beyond.

- **OSU-Cascades:** Over the next decade, OSU-Cascades will expand, creating a 128-acre campus for up to 5,000 students. The transformation of the university properties — a former pumice mine and former Deschutes County demolition landfill — is one of the most innovative university development projects in the country. While expansion will be slow — perhaps one building every two years — the goal is to share the story of the development and the ways OSU will minimize any adverse impact on the surrounding community.

- **Student Housing:** Two new residence halls, featuring studios for upper-level undergraduate and graduate students, are under construction. The halls will feature approximately 285 beds and have a projected completion date of fall 2020.

Looking ahead, the university will focus construction activity on the Corvallis campus around renovating, repurposing and retrofitting existing facilities. To that end, the university is setting aside $5 million in
continuing funds each year until a $45 million continuing fund has been created that can be used to improve the quality of existing space.

As of fall 2018, the number of students enrolled solely in Ecampus courses has grown to 6,565. In January 2019, OSU’s online bachelor’s programs were ranked third in the nation by U.S. News & World Report, making it Ecampus’ fifth straight year in the top ten. Oregon State Ecampus now delivers more than 20 undergraduate degrees, nearly 30 graduate programs, and more than 25 minor and certificate programs.

At the time of the 2014 report, the university had received approval to purchase properties totaling 56 acres near downtown Bend to establish a stand-alone campus for OSU-Cascades. This marked the opening of the first new campus in Oregon in over 50 years. The campus at OSU-Cascades now consists of 128 contiguous acres near downtown Bend. Previously, the university operated on the Central Oregon Community College campus, offering upper-division and graduate coursework toward bachelor’s and master’s degrees.

In fall 2015, OSU-Cascades expanded to a four-year university when it welcomed its first freshman class. The campus’ first academic building opened in September 2016, and a dining hall/classroom building and residence hall opened in January 2017. In 2018, OSU-Cascades received funding from the Oregon Legislature to support construction of a second academic building. OSU now has a $12 million request to the state for funding for a student experience center at OSU-Cascades, which will add to $5 million raised through student fees. The university is also seeking $17.5 million for site preparation and infrastructure projects consistent with the Bend City Council-approved campus master plan. In fall 2018, 1,259 students enrolled at OSU-Cascades, up from 936 at the time of the last report. The Bend campus plans to grow to 3,000 to 5,000 students by 2035.

In fall 2018, OSU expanded its presence in the Portland region by opening the OSU Portland Center at the historic Meier & Frank Building downtown. The new location is home to hybrid learning experiences and professional development courses, as well as to research and engagement programs across the region. Over 90 students took advantage of hybrid offerings in fall term 2018.

Since the last report, the university has also continued to expand learning, research and service activities in Newport. In 2016, OSU launched the Marine Studies Initiative, which serves as a catalyst for marine-related teaching, research and engagement across the university and helps to facilitate students’ experiential learning at the Oregon Coast. In March 2018, OSU launched construction of the Marine Studies Building at the Hatfield Marine Science Center in Newport. The new facility will be a key component of the Marine Studies Initiative and the university’s commitment to advance its international leadership in the marine sciences.

**Student Success**

Since 2014, the university has put deliberate focus on student success. OSU has undertaken three major Undergraduate Student Success Initiative (USSI) efforts. First is a series of academic interventions intended to bolster student success directly through expanded student support services, particularly related to advising and financial aid, or indirectly through changes in learning models and providing instructors and administrators with better and more timely data. In addition, a new undergraduate education leadership position and division were created.

Second, OSU joined with ten other major public research universities — Georgia State, Central Florida, Ohio State, Purdue, Texas at Austin, Michigan State, Kansas, Arizona State, Iowa State, and UC-Riverside — to form the University Innovation Alliance. The alliance collaborates to increase total degrees awarded,
especially for Pell Grant-eligible students, while improving the quality of programs and managing operating costs effectively.

Third, a fundraising initiative was established in 2017 in partnership with the OSU Foundation to raise $150 million to support student success. More than $100 million has been raised to date.

Improving student success will continue to be a shared enterprise across the entire university and will require policy changes, enhanced practices and continued financial investments.

**Equity and Inclusion**

Over the past five years, OSU has redoubled its effort to create a community in which all students, faculty and staff can realize their full potential. In 2015, OSU created the Office of Equal Opportunity and Access to oversee compliance with civil rights and affirmative action laws, regulations and policies, along with a community diversity relations position to work with diverse communities throughout the state.

At the same time, the university also formed the Office of Institutional Diversity and in 2017 hired its first vice president and chief diversity officer. The chief diversity officer chairs the President and Provost’s Leadership Council for Equity, Inclusion and Social Justice, which shapes and guides a deliberate institutional strategy to provide comprehensive leadership and investments in equity, inclusion, diversity and social justice initiatives throughout the university. In 2018, OSU completed *Innovate & Integrate: Plan for Inclusive Excellence*, OSU’s first comprehensive diversity strategic plan and a key step toward realizing the vision to be a national model for inclusive excellence.

**Other Important Changes and Milestones**

- In 2011, the Council on Education for Public Health approved OSU’s request to start the process of becoming a nationally accredited college of public health. In 2014, OSU’s College of Public Health and Human Sciences became the first in Oregon to earn accreditation.

- OSU reorganized its human resources structure in 2017 and hired a new chief human resources officer in 2018. This is part of the university’s goal to be more proactive and strategic in human resources support and development institution-wide.

- October 2018 marked the 10-year anniversary of INTO OSU, a collaboration between OSU and INTO University Partnerships to meet the internationalization goals detailed in OSU’s first strategic plan.

- In October 2018, Oregon State concluded a 15-month celebration of the university’s 150th anniversary. OSU150 showcased Oregon State’s past, present and future contributions to Oregon, the nation and the world.

- At the time of the last report, the university’s first comprehensive campaign was coming to a close. The Campaign for OSU started in 2004 with a goal of raising $625 million. The campaign concluded in December 2014 with gifts from more than 106,000 donors totaling $1.14 billion. Planning is now underway for the next campaign. Fundraising for FY18 totaled $152 million, the highest annual total in university history, and the $39 million raised in December 2018 was the highest monthly total ever.

- In fall 2017, Provost Edward Feser initiated a strategic and operational realignment of duties and roles in the Office of the Provost. The changes followed a period of observation and assessment by the provost and were a product of collaborative thinking on the part of senior leaders in the Office of the Provost and other key stakeholders across the institution. Redesign decisions are discussed fully in Chapter 5.
Response to Recommendation Regarding Mission Fulfillment

OSU’s Year Seven Mission Fulfillment and Sustainability Self-Evaluation Report addresses the commission’s recommendation that the university “further refine its articulation of an acceptable threshold of mission fulfillment” (Standard 1.A.2). This is the only outstanding recommendation facing the university as it prepares its Year Seven report.

Since the commission’s last recommendation, the university has evolved its definition of an acceptable threshold of mission fulfillment to more clearly and tangibly reference its distinctive role as a very research intensive (R1) public land grant university that is committed to inclusive excellence and faithful service as Oregon’s statewide university. The university measures mission fulfillment with 17 yardsticks that map to its three core theme objectives and indicators of achievement. Thresholds for each yardstick are derived with reference to outcomes for U.S. R1 land grant universities, supplemented with some qualitative information and internal benchmarks that reference the university’s efforts to continuously improve in all aspects of research, teaching and engagement.

The university’s aspirations to become ever more effective and impactful in its mission are articulated in its five-year strategic plans. The goals in the OSU strategic plans that were operative during this most recent accreditation cycle are fully consistent with the university’s three core themes. However, while there is a tangible link between basic mission fulfillment (delivering mission to an “acceptable threshold”) and the university’s strategies to elevate its activities and impact, OSU’s rubrics and metrics for determining mission fulfillment and assessing its progress on its strategic plans are not synonymous.

The Year Seven report provides evidence that OSU is fulfilling its mission. As it embarks on the next accreditation cycle, the university will use its new five-year strategic plan (SP4.0: Transformation, Excellence and Impact) and the results of this self-study to continue to revisit and refine how it defines and measures mission fulfillment.
CHAPTER 1:
Mission and Core Themes
The institution articulates its purpose in a mission statement and identifies core themes that comprise essential elements of that mission. In an examination of its purpose, characteristics, and expectations, the institution defines the parameters for mission fulfillment. Guided by that definition, it identifies an acceptable threshold or extent of mission fulfillment.

**Eligibility Requirement 2 — Authority:**
Oregon State University has been continuously accredited since 1924 and is currently accredited by the Northwest Commission on Colleges and Universities (NWCCU). OSU is authorized to offer baccalaureate, master’s, doctorate, and first professional degrees, as well as undergraduate, post-baccalaureate and graduate-level certificates.

The university is governed and guided by the Oregon State University Board of Trustees. The Oregon Higher Education Coordinating Commission (HECC) provides coordination support on funding requests and a number of other areas, as well as approval for new programs or tuition increases over 5 percent.

**Eligibility Requirement 3 — Mission and Core Themes:**
Oregon State University’s mission and core themes as an international public research university are consistent with similar degree-granting institutions of higher education. The university draws dedicated students and innovative faculty from all 50 states and over 100 countries, and OSU is one of only two public universities in the nation to hold all four designations as a land, sea, space and sun grant university. It is also the only Oregon university with dual Carnegie classifications of community engagement and very high research activity (R1). Oregon State is committed to teaching, research and outreach and engagement, and the university promotes economic, social, cultural and environmental progress for the people of Oregon, the nation and the world.

As the state’s land grant institution, OSU programs and faculty are embedded in every county of the state and are dedicated to addressing Oregon’s greatest challenges. Guided by the philosophy that the state of Oregon is its campus, OSU works in partnership with the state’s K-12 school systems, community colleges and other public universities to provide access to high-quality educational programs for the citizens of Oregon and beyond. Strong collaborations with business and industry, as well as state and federal agencies, drive OSU’s research and engagement enterprises.

### 1.A MISSION

#### 1.A.1 Mission Statement

The institution has a widely-published mission statement — approved by its governing board — that articulates a purpose appropriate for an institution of higher learning, gives direction for its efforts, and derives from, and is generally understood by, its community.

Oregon State University’s mission statement was approved by the university’s governing board in March 2004. The statement appears in four strategic plans produced since 2004, and it has been widely publicized and referenced online and in a variety of university documents:
As a land grant institution committed to teaching, research and outreach and engagement, Oregon State University promotes economic, social, cultural and environmental progress for the people of Oregon, the nation and the world.

This mission is achieved by producing graduates competitive in the global economy, supporting a continuous search for new knowledge and solutions and maintaining a rigorous focus on academic excellence, particularly in the three signature areas: advancing the science of sustainable Earth ecosystems; improving human health and wellness; and promoting economic growth and social progress.

The strategic planning documents pertinent for this accreditation cycle — *SP3.0: Focus on Excellence* (OSU’s 2014-18 plan), *Vision 2030* and *SP4.0: Transformation, Excellence and Impact* (OSU’s 2019-23 plan) — build on the mission statement to articulate the university’s values, vision for the future and goals and actions to realize that vision.

### 1.A.2 Mission Fulfillment

The institution defines mission fulfillment in the context of its purpose, characteristics and expectations. Guided by that definition, it articulates institutional accomplishments or outcomes that represent an acceptable threshold or extent of mission fulfillment.

OSU defines mission fulfillment in the context of its distinctive role as a very high research activity (Carnegie R1) public land grant university that is committed to inclusive excellence and faithful service as Oregon’s statewide university. Consistent with the university’s mission, OSU established the following core themes for the 2011-18 accreditation cycle:

1. Undergraduate Education
2. Research and Graduate Education
3. Outreach and Engagement

Associated with each core theme are objectives and indicators of achievement. These are presented in Section 1.B, along with the rationale for each objective. The extent of mission fulfillment is articulated using the accomplishments for these objectives and indicators of achievement.

To guide the determination of the extent of mission fulfillment, the university defines and measures 17 yardsticks that directly map to the core themes and associated objectives and indicators of achievement (see Table 1.A.2A). Each yardstick informs how OSU is evaluating mission fulfillment as noted in the left-hand column of Table 1.A.2A.

Many of these yardsticks are associated with University Strategic Metrics that the institution tracks for strategic planning. These yardsticks are noted with an asterisk in Table 1.A.2A.

Thresholds for each mission fulfillment yardstick are derived with reference to outcomes for U.S. R1 land grant universities or with reference to OSU’s internal benchmarks and targets that gauge progress on efforts to continuously improve in all aspects of our mission. These thresholds are noted in Table 1.A.2A and discussed in Chapter 5.
### Table 1.A.2A

#### Mission Fulfillment Yardsticks

<table>
<thead>
<tr>
<th>Core Theme 1: Undergraduate Education</th>
<th>Links to Indicators:</th>
<th>Exceeds Expectations</th>
<th>Meets Expectations</th>
<th>Falls Below Expectations</th>
</tr>
</thead>
<tbody>
<tr>
<td>We retain our students</td>
<td>Y1 The first-year retention rate for first-time, full-time degree-seeking students*</td>
<td>1.1.4</td>
<td>Rate exceeds 90%</td>
<td>Rate is between 80 and 90%</td>
</tr>
<tr>
<td>We graduate our students</td>
<td>Y2 The six-year graduation rate for first-time, full-time degree-seeking students*</td>
<td>1.1.3</td>
<td>Rate exceeds 75%</td>
<td>Rate is between 60 and 75%</td>
</tr>
<tr>
<td>Students from all backgrounds succeed</td>
<td>Y3 Gaps in graduation rates for diverse students</td>
<td>1.1.3 1.1.4</td>
<td>No gaps exist</td>
<td>Gaps are closing</td>
</tr>
<tr>
<td>We provide online learning options to serve nontraditional learners</td>
<td>Y4 Ecampus undergraduate enrollment*</td>
<td>1.1.1 3.1.1</td>
<td>Increasing</td>
<td>Stable</td>
</tr>
<tr>
<td>We prioritize serving Oregon learners</td>
<td>Y5 Percent of undergraduate degrees awarded to Oregon residents</td>
<td>1.1.5</td>
<td>N/A</td>
<td>66% and above</td>
</tr>
<tr>
<td>We maintain quality and assess learning outcomes</td>
<td>Y6 Percentage of academic program reviews and student learning outcome assessments completed</td>
<td>1.2.1 1.2.2</td>
<td>Rate exceeds 90%</td>
<td>Rate is between 80 and 90%</td>
</tr>
<tr>
<td>Our campus environments support student success</td>
<td>Y7 Scores on NSSE regarding supportive campus environment</td>
<td>1.3.4</td>
<td>Scores are significantly above mean</td>
<td>Scores are above mean</td>
</tr>
<tr>
<td>We integrate research and discovery in the learning experience</td>
<td>Y8 Engagement of students in faculty research and discovery</td>
<td>1.4.2 1.4.3 1.4.4 1.4.5</td>
<td>Increasing significantly</td>
<td>Increasing</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Core Theme 2: Research and Graduate Education</th>
<th>Links to Indicators:</th>
<th>Exceeds Expectations</th>
<th>Meets Expectations</th>
<th>Falls Below Expectations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Our faculty is research active</td>
<td>Y9 Ratio of tenured/tenure-track faculty to total instructional faculty</td>
<td>2.1.5</td>
<td>Ratio exceeds 0.8</td>
<td>Ratio is between 0.6 and 0.8</td>
</tr>
<tr>
<td>Our external research funding profile is strong</td>
<td>Y10 Total R&amp;D expenditures*</td>
<td>2.1.1</td>
<td>Increasing significantly</td>
<td>Increasing</td>
</tr>
</tbody>
</table>
Our research faculty is productive

Y11 Percentage of faculty with high-impact national or international publications

2.1.6 Rate exceeds 75% Rate is between 50 and 75% Rate is below 50%

We are training the next generation of scientists and scholars

Y12 Ratio of doctoral degrees awarded to all degrees awarded*

2.2.2 Ratio exceeds 0.10 Ratio is between 0.05 and 0.10 Ratio is below 0.05

We maintain quality and assess learning outcomes

Y13 Percentage of graduate programs in compliance with full cycle review

2.3.1 Rate exceeds 90% Rate is between 80 and 90% Rate is less than 80%

Core Theme 3: Outreach and Engagement

<table>
<thead>
<tr>
<th>Mission Fulfillment</th>
<th>Yardstick</th>
<th>Links to Indicators:</th>
<th>Exceeds Expectations</th>
<th>Meets Expectations</th>
<th>Falls Below Expectations</th>
</tr>
</thead>
<tbody>
<tr>
<td>We provide robust professional and continuing education</td>
<td>Y14 PACE offers a diversity of options suitable for professional and nontraditional learners</td>
<td>3.1.2 3.1.3</td>
<td>Diversity of programming is high and enrollment is growing</td>
<td>Diversity of programming is high and enrollment is stable</td>
<td>Diversity of programming is low and enrollment is falling</td>
</tr>
<tr>
<td>We collaborate actively with Oregon communities</td>
<td>Y15 Collaborations are diverse and distributed widely</td>
<td>3.1.4 3.2.1 3.2.2 3.2.3 3.2.4</td>
<td>Diverse collaborations throughout the state, with external funding</td>
<td>Diverse collaborations throughout the state</td>
<td>Limited collaborations in few areas</td>
</tr>
<tr>
<td>We maintain a physical presence throughout Oregon with research Extension and outreach activities</td>
<td>Y16 Percentage of Oregon counties with an OSU campus, research facility or Extension office</td>
<td>3.2.1</td>
<td>Rate is 90% or higher</td>
<td>Rate is between 65 and 90%</td>
<td>Rate is below 65%</td>
</tr>
<tr>
<td>We are commercializing OSU innovations</td>
<td>Y17 Startups, invention disclosures and licensing revenues</td>
<td>2.1.2 3.3.1 3.3.5</td>
<td>Increasing significantly</td>
<td>Stable or increasing</td>
<td>Decreasing</td>
</tr>
</tbody>
</table>

*Yardstick associated with a university metric that the institution tracks for SP3.0.

OSU’s strong collaborative culture and steadfast commitment to academic excellence, especially in three signature areas of distinction — advancing the science of sustainable Earth ecosystems, improving human health and wellness, and promoting economic growth and social progress — provide additional lenses to assess mission fulfillment holistically. Evidence of the university’s achievement of academic excellence is also found in the national rankings of its academic colleges, including the colleges of Earth, Ocean, and Atmospheric Sciences; Forestry; and Agricultural Sciences, as well as the status of its accredited colleges, including the colleges of Business; Public Health and Human Sciences; Engineering; Veterinary Medicine, Pharmacy; and Education.

Detailed evidence of mission fulfillment — based on the assessable accomplishments of the core theme objectives, mission fulfillment yardsticks and collaborations in the signature areas of distinction — is presented in Chapter 5.
Link between Mission Fulfillment and Strategic Planning

Although there is a link between fundamental mission fulfillment (delivering mission to an acceptable threshold) and the university’s strategies to elevate its activities and impact, OSU’s rubrics and metrics for determining mission fulfillment and assessing progress on its strategic plans are not synonymous. OSU’s strategic plans are not intended to define how the university will deliver its mission. Rather, the plans identify the actions and tactics the university will take over a given five-year period to elevate its performance and impact ever higher. Those actions and tactics are informed by careful assessment of the constantly evolving opportunities and threats facing the university, given its distinctive mission within the global higher education landscape.

Since OSU’s strategic plans take the university’s mission as a point of departure, the plans are fully consistent with the core themes and indicators that reflect that mission and its fulfillment. For most of the current accreditation cycle, OSU has been guided by its 2014-18 strategic plan, SP3.0: Focus on Excellence. Table 1.A.2B illustrates that the three core themes align with SP3.0 goals.

Table 1.A.2B

<table>
<thead>
<tr>
<th>Mission Core Themes</th>
<th>Strategic Plan Goals (SP3.0)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Undergraduate Education</td>
<td>1. Provide a transformative educational experience for all learners</td>
</tr>
<tr>
<td>2. Research and Graduate Education</td>
<td>2. Demonstrate leadership in research, scholarship and creativity</td>
</tr>
<tr>
<td>3. Outreach and Engagement</td>
<td>3. Strengthen OSU’s impact and reach throughout the state and beyond</td>
</tr>
</tbody>
</table>

In 2017, OSU initiated a university-wide dialogue to inform the development of its current key planning documents: Vision 2030 and SP4.0: Transformation, Excellence and Impact. Vision 2030 articulates Oregon State’s focus and distinction among leading research universities as of the year 2030. It describes the university’s commitment to provide access to a high-quality and affordable education to all learners with appropriate qualifications and to engage in world-class discovery, innovation, and engagement, especially in the university’s signature areas. This visioning exercise sought to anticipate OSU’s unique contributions as higher education continues to change and evolve.

Taking Vision 2030 as the destination, SP4.0 defines goals and actions to move the university closer to that destination over the next five years. SP4.0 was approved by the Oregon State University Board of Trustees in October 2018 and formally launched in January 2019. OSU’s three SP3.0 goals persisted in SP4.0, and they are joined by one additional goal: the achievement of a culture of belonging, collaboration, and innovation. The 2019-23 plan prioritizes actions and tactics aimed at advancing undergraduate student success, strengthening the university’s research infrastructure and support, growing graduate programs, and increasing the university’s economic development impact.

During the early years of the next NWCCU accreditation cycle, the university will revisit the mission core themes and indicators of achievement in light of the goals of SP4.0, in order to ensure continuing alignment.

Chapter 4 provides an in-depth evaluation of the evidence for assessing the extent of mission fulfillment by core theme objectives and indicators of achievement. Also included is a discussion of OSU’s progress on SP3.0 goals, core theme improvements since the last accreditation, and challenges and opportunities for advancing the university’s commitments. Chapter 5 articulates mission fulfillment and the acceptable
thresholds for each mission fulfillment yardstick. The report concludes with an assessment of mission fulfillment using the lens of OSU’s signature areas: advancing the science of sustainable Earth ecosystems, improving human health and wellness, and promoting economic growth and social progress.

1.B CORE THEMES

1.B.1 Core Themes Overview

The institution identifies core themes that individually manifest essential elements of its mission and collectively encompass its mission.

As noted above, OSU defines its mission as “a land grant institution committed to teaching, research and outreach and engagement” that “promotes economic, social, cultural and environmental progress for the people of Oregon, the nation and the world.” The university seeks to achieve that mission by producing graduates competitive in the global economy, supporting a continuous search for new knowledge and maintaining a rigorous focus on academic excellence.

OSU’s three core themes capture the fundamental elements of this mission: 1) undergraduate education; 2) research and graduate education; and 3) outreach and engagement.

1.B.2 Overview of Established Objectives for Each Core Theme

The institution establishes objectives for each of its core themes and identifies meaningful, assessable and verifiable indicators of achievement that form the basis for evaluating accomplishment of the objectives of its core themes.

CORE THEME 1 – UNDERGRADUATE EDUCATION

Description
The undergraduate experience is at the core of a university’s mission. The university strives to provide an excellent teaching and learning environment to achieve student access, persistence, and success through graduation and beyond.

Objective 1.1
Provide broad and continuing access to undergraduate university degrees for the people of Oregon and beyond.

Indicators of Achievement
1.1.1 Applications, admittances and matriculations for first-time, full-time, degree-seeking college (“freshmen”) students and transfer students: Total, historically underrepresented, online (Ecampus) and OSU-Cascades.
1.1.2 Percent of degree-seeking undergraduates with high college expense to family income ratio.
1.1.3 Six-year graduation rate: Total, historically underrepresented students and Pell-eligible students.
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1.1.4 First-year retention rates.

1.1.5 Bachelor’s degrees earned by historically underrepresented, Oregon resident, transfer and campus.

**Rationale:** Oregon State University’s mission as the state’s land grant university creates an imperative that the knowledge and skills inherent in an OSU degree are made available to Oregonians and others through inclusive excellence in teaching, research and outreach and engagement. OSU’s mission further states that the university serves to promote the progress of Oregon, the nation, and the world. Implementing such progress demands the graduation of bachelor’s degree recipients with the proper knowledge and skills. Objective 1 highlights key markers that indicate the opening of doors and removal of barriers to students’ attainment of bachelor’s degrees.

Indicator 1.1.1 provides the raw numbers of interest, selection and commitment to an OSU education, with comparisons in key categories. This indicator determines if initial entry to the university is equitable for all students. Knowledge of underrepresentation among identity groups allows the university to optimize its recruiting and pre-college programs. Once admitted, students face many challenges in their quest for a degree. Indicator 1.1.2 is one measure of financial stress, informing the university’s efforts to remove financial obstacles to degree attainment. Indicator 1.1.3, the six-year graduation rate, tracks how many students from an initial cohort of first-time undergraduates ultimately earn an OSU degree. The six-year graduation rate gives a partial measure of the effectiveness of university efforts to address institutional barriers. Indicator 1.1.4 provides a measure of how successful the university is at retaining first-year students. Finally, Indicator 1.1.5 compares the bachelor’s degrees earned by various demographic groups. This indicator allows OSU to address opportunity gaps that are producing achievement gaps across the various student demographic groups.

**Objective 1.2**
Provide rigorous and effective undergraduate degree programs.

**Indicators of Achievement**

1.2.1 Percent of active academic undergraduate programs with completed external academic program reviews.

1.2.2 Percent of undergraduate programs that have full-cycle student learning outcomes assessments.

1.2.3 Participation rates in experiential learning with a focus on internships, research, service learning and global learning.

1.2.4 Satisfaction with value of degree at time of graduation.

1.2.5 Percent of graduating seniors reporting immediate plans to work in their field of study or attend graduate school following graduation.

**Rationale:** Objective 1.2 encompasses the quality of degree programs that form the foundation of OSU’s undergraduate education program. Full-cycle student learning outcomes assessment (outcomes defined, student learning assessed, faculty analyzed, curriculum and pedagogy improved, and cycle repeated) provides a means to evaluate effectiveness (Indicator 1.2.1). The requisite disciplinary and liberal education knowledge, skills and abilities are captured in the learning outcomes of degree programs and the Baccalaureate Core (Bacc Core). Measuring student learning against these established learning outcomes (Indicator 1.2.2) provides evidence of educational program effectiveness. Findings from student learning assessments inform adjustments to curricular design and teaching methods and lead
to student learning improvements over time. OSU values experiential learning as a means to apply and extend curricular learning to real-world settings and preparation for post-college challenges. Indicator 1.2.3 tracks the number of students who participate in high-impact, experiential learning. As part of an annual graduation survey, students provide feedback on their experiences at OSU with faculty and staff, with their academic programs and with experiential learning. Students also provide feedback on their overall level of satisfaction with the value of their degree (Indicator 1.2.4) and plans for work or graduate school following graduation (Indicator 1.2.5).

**Objective 1.3**
Provide a supportive and healthy learning environment for student success and leadership development at all levels.

**Indicators of Achievement**
1.3.1 Participation rates in first-year experience courses and retention rate of first-year experience course participants compared to non-participants.
1.3.2 Percent of degree-seeking undergraduates who identified two or more university representatives who helped them succeed at OSU.
1.3.3 Percent of degree-seeking undergraduates who indicated two or more campus student support resources that were accessible.
1.3.4 National Survey of Student Engagement (NSSE) Supportive Campus Environment benchmarks.

**Rationale:** To fulfill its mission, the university is working hard to remove barriers to earning an OSU degree and contributing to Oregon’s progress. Objective 1.3 comprises faculty affairs, student affairs, enrollment management, Ecampus and outreach and engagement services and programs that support success for students. These units provide high-quality services and programs to support learning excellence from recruitment to matriculation and onward to graduation. Indicator 1.3.1 assesses OSU’s ability to retain students through high-quality learning experiences as captured by participation in first-year experience courses. OSU’s Inclusivity Survey provides students with the opportunity to identify university representatives who have helped them succeed and indicate campus support resources that were accessible to them while attending OSU (Indicators 1.3.2 and 1.3.3). The National Survey of Student Engagement (NSSE) benchmarks (Indicator 1.3.4) provide a snapshot of supports that promote students’ ability to achieve academic excellence and persist to degree completion.

**Objective 1.4**
Use faculty research and scholarship to enrich the undergraduate curriculum.

**Indicators of Achievement**
1.4.1 Number of faculty-led study abroad programs.
1.4.2 Examples of innovative curricula that incorporate faculty research and scholarship.
1.4.3 Examples of faculty research that engages undergraduate students.
1.4.4 Participation in undergraduate research.
1.4.5 Examples of support for undergraduate student research.

**Rationale:** Faculty research and scholarship enrich the undergraduate curricula and provide students with the opportunity to address complex issues beyond the formal classroom setting. The aim is to
MISSION AND CORE THEMES

promote a collegial community of faculty and students and increase students’ capacity to think and reason critically, preparing students for careers after graduation. Indicator 1.4.1 reports on the number of faculty-led study abroad programs and how students pursue coursework in specific areas of study. Indicator 1.4.2 provides examples of how faculty develop innovative curricula that incorporate their research and scholarship, and Indicator 1.4.3 provides examples of how undergraduate students are engaged in research. OSU encourages students to find mentors and apply for research opportunities, and the university provides a variety of opportunities to achieve this goal (Indicator 1.4.4). Finally, Indicator 1.4.5 assesses support for undergraduate student research and provides examples of OSU’s commitment to advancing undergraduate research.

CORE THEME 2 – RESEARCH AND GRADUATE EDUCATION

Description
The Carnegie Classifications of Institutions of Higher Education classifies Oregon State University as a Doctoral University: Very High Research Activity (commonly labeled R1). OSU is one of only two land, sea, space and sun grant universities in the U.S. Research and graduate education are interconnected and essential components of the university’s mission. Research also supports undergraduate students and creates opportunities for them to explore graduate learning opportunities.

Objective 2.1
Create and maintain a diverse research and scholarship environment that consistently achieves high impacts.

Indicators of Achievement
2.1.1 Grant and contract expenditures: Total and normalized.
2.1.2 Private sector research, testing, activity and licensing agreements: Licenses/options and industry contracts.
2.1.3 Capacity Grant awards.
2.1.4 Examples of research excellence and innovation in OSU’s signature areas of distinction.
2.1.5 Ratio of tenured/tenure-track faculty to total instructional faculty.
2.1.6 Percent of faculty with national/international refereed scholarly publications.

Rationale: Fulfilling OSU’s mission to “promote economic, social, cultural and environmental progress for the people of Oregon, the nation and the world” requires two things: the creation of new knowledge and the graduation of professionals with the skills to use that knowledge to become leaders. These are achieved via innovative and effective teaching and the maintenance of a rigorous research portfolio. Indicators 2.1.1 and 2.1.2 are measures of government and private confidence in the quality and value of OSU research and economic impact efforts. Indicator 2.1.2 considers the distribution of financial research investments across OSU research faculty and staff, providing one measure of researcher quality and productivity. Performance in earning capacity grants is captured by Indicator 2.1.3. Indicator 2.1.4 provides examples of research excellence and innovation in OSU’s signature areas of distinction that draw from disciplines across the university and integrate research, engagement and teaching at both the undergraduate and graduate levels. Indicators 2.1.5 and 2.1.6 provide evidence that OSU is producing national and international refereed scholarly publications that are having an impact in Oregon and beyond.
Objective 2.2
Attract, retain and support high-quality and diverse students for graduate programs.

Indicators of Achievement
2.2.1 Graduate students and historically underrepresented students.
2.2.2 Ratio of doctoral degrees awarded to all degrees awarded.
2.2.3 Proportion of graduate students supported by assistantships or university fellowships.
2.2.4 Eight-year graduation rates: All doctoral students and historically underrepresented students.
2.2.5 Four-year graduation rates: All master’s students and historically underrepresented students.
2.2.6 Share of grants with funding support provided for graduate students.

Rationale: Attracting, retaining and supporting high-quality graduate students aligns with OSU’s mission and assumes a major institutional investment and commitment. Furthermore, the land grant aspect of the mission compels OSU to envision its community broadly, ensuring that Oregonians are well represented in their demographic diversity while also ensuring the benefit from interactions with students from other states and countries. Indicator 2.2.1 tracks program and college-level enrollment rates for underrepresented students. Indicator 2.2.2 measures OSU’s efforts to provide high-quality doctoral education. Indicators 2.2.4 and 2.2.5 measure the percent of a given cohort (for their respective degree) who receive a degree within a standard comparator period. Another indicator of university commitment to a high-quality graduate student body is financial support (Indicators 2.2.3 and 2.2.6). By removing financial obstacles via assistantships, university fellowships and other awards, the university not only attracts higher-quality students, but also allows such students to flourish as they can focus on their academic endeavors.

Objective 2.3
Provide high-quality training to support graduate students’ degree completion and prepare them for post-graduation opportunities.

Indicators of Achievement
2.3.1 Percentage of active graduate programs that have completed full-cycle program reviews.
2.3.2 Enrollment in the Graduate Certificate in College and University Teaching (GCCUT) program.
2.3.3 Participant counts in graduate student professional development.
2.3.4 Examples of resources to support graduate students during their academic careers and beyond.

Rationale: Indicator 2.3.1 tracks the university’s commitment to a full-cycle assessment review process. All graduate programs undergo a systematic program review once every 10 years. As part of this process, discipline experts from peer institutions provide feedback and recommendations to ensure that programs align with national standards. The results of full-cycle program assessment reviews are central to these program reviews. OSU has an obligation to support and train the next generation of leaders. This obligation is fulfilled through providing graduate students with programs to gain experience teaching at the university level (Indicator 2.3.2), professional development opportunities (Indicator 2.3.3), and resources to support their graduate studies and beyond (Indicator 2.3.4).
CORE THEME 3 – OUTREACH AND ENGAGEMENT

Description
Outreach and engagement at Oregon State University provides access to education and research findings for learners, communities, and stakeholders who are not located on one of OSU’s campuses, often using means other than traditional classroom-based instruction. The university aims to actively engage with the communities it serves, promoting economic vitality, environmental stewardship and quality of life. OSU has revised the original objectives and indicators in Core Theme 3 to better reflect mission fulfillment in the area of outreach and engagement, incorporating the feedback of a wide range of faculty and staff. The revised objectives broaden the scope. The Division of Outreach and Engagement strategic planning process in 2015 guided the revision, which clarified how the division interprets its mission in this domain.

Objective 3.1
Extend transformative educational experiences to learners, communities and organizations using means beyond traditional classroom-based instruction.

Indicators of Achievement
3.1.1 Ecampus enrollments and degrees and certificates earned in total and by race/ethnicity, rural status, veteran status, nontraditional age.
3.1.2 Noncredit certificates earned.
3.1.3 Participant counts in Professional and Continuing Education (PACE) programs.
3.1.4 Counts of collaborative research projects.
3.1.5 Participant counts of youth development programs.

Rationale: The Morrill Act of 1862 that created the land grant universities greatly expanded the scope of who participates in learning and knowledge development and how learning and knowledge are exchanged. Objective 3.1 highlights how OSU extends educational experiences and offerings to learners, communities and organizations beyond traditional classroom-based settings and forms of instruction. This is achieved in a variety of means, including online education, field instruction, educational tours, virtual response to inquiries and various professional development offerings. The OSU Extension Service trains and supports volunteers and provides credentials (certificates) and noncredit instruction and training to populations that cannot or do not need to travel to a fixed campus for the specific program.

Oregon State University Ecampus is the online education unit of OSU. Ecampus partners with academic units to develop and deliver courses, degree programs and certificate programs online. Ecampus courses and programs are delivered fully online or in a hybrid (blended) format that combines virtual learning with face-to-face instruction. All Ecampus courses are designed, developed and taught by OSU faculty, and revenues are largely distributed to academic programs.

A key goal in all outreach and engagement efforts is to ensure equitable access to a diversity of participants. Indicator 3.1.1 captures the full range of focus populations that may benefit most from access to online degrees, including those who are place-bound, such as rural students, as well as veterans, older adults, and those who may be working or have family obligations and need the flexibility of online instruction. Indicators 3.1.2 and 3.1.3 both address noncredit certificate and professional or instructional
offerings that allow individuals to advance in their careers or improve their personal circumstances. Indicator 3.1.4, collaborative research, could align with either Objective 3.1 or Objective 3.2. OSU views the distribution of county Extension Service offices, Agricultural Experiment Stations and Forest Research Laboratories as one type of transformational experience that extends research results to local contexts and issues. However, OSU researchers and Extension Service agents also learn and develop knowledge from collaborative work with their communities. Similarly, Indicator 3.1.5 demonstrates the variety and extent of youth development programs that extend knowledge while also providing OSU researchers with current real-world experiences and OSU students with the opportunity to serve as instructors and mentors.

Objective 3.2
Increase collaboration with communities and stakeholders to build and sustain mutually beneficial and reciprocal relationships to advance learning, research and engagement opportunities.

Indicators of Achievement
3.2.1 Extension Service program partnerships with participant counts and total volunteer hours.
3.2.2 Amount of external funding secured for outreach and engagement, including NSF, NIH and NIFA.
3.2.3 Scores on the Citizen Evaluation of Teaching (CET).
3.2.4 Research, scholarship and creative activities/outcomes that provide collaboration with communities and stakeholders.

Rationale: Objective 3.2 describes a function that is distinct from structured programs identified in Objective 3.1 and is more about sustained collaborative engagements that are also mutually beneficial. Indicator 3.2.1 captures the breadth and categories of Extension Service program partnerships and participation levels. The number of volunteer hours associated with partnerships is a measure of how much a community values collaborations. Attainment of resources via grants and external funding (Indicator 3.2.2), is a measure of the financial benefit of Extension partnerships and the effectiveness in securing those resources. Indicator 3.2.3 measures the effectiveness of collaboration using average scores from the Citizen Evaluation of Teaching (CET). This has a general parallel to effectiveness of teaching scores collected in standard OSU courses at the end of a term, although in this instance, teaching has a broader connotation and covers a greater variety of learning approaches. Indicator 3.2.4 provides both a count and examples of activities and outcomes that result from efforts such as research and scholarly compilations and creative endeavors and events. The range of outcomes can be broad in relation to the needs and nature of the participants.

Objective 3.3
Increase the impact of outreach and engagement activities, economic development and quality of life throughout Oregon and beyond.

Indicators of Achievement
3.3.1 Measures of OSU’s economic development and societal impacts.
3.3.2 Examples of the impact of OSU’s statewide public services programs.
3.3.3 Number of global partnerships and agreements.
3.3.4 Number of students participating in study abroad programs and other international experiences.

3.3.5 Examples of startup businesses from OSU research and outreach.

3.3.6 Examples of the use of outreach and engagement in the academic curriculum.

**Rationale:** Objective 3.3 captures the impact of OSU’s outreach and engagement activities, economic development, student success and achievement and quality of life throughout Oregon and beyond. Indicator 3.3.1 measures OSU’s global economic and societal impact. Indicator 3.3.2 tracks the richness and extent of the university’s Statewide Public Service Programs — the OSU Extension Service, Oregon Agricultural Experiment Station, and the Oregon Forest Research Laboratory. The university also engages in education, research and outreach activities in the state, nation and around the world. Indicator 3.3.3 tracks the number of global partnerships and agreements OSU enters into each year. Indicator 3.3.4 measures the number of students who participate in study abroad programs and other international experiences offered through the Office of Global Opportunities. OSU’s research and outreach activities have also helped incentivize startup businesses, as shown by the examples listed in Indicator 3.3.5. Finally, Indicator 3.3.6 highlights examples of OSU’s use of outreach and engagement in the academic curriculum and how it advances high-impact teaching and learning.
OSU SPOTLIGHT: MARINE STUDIES INITIATIVE

Marine habitats, nearshore ecosystems and coastal communities face daunting pressures that threaten their sustainability: climate change, ocean acidification, rising sea levels, variable fish stocks, natural and human-caused disasters, and many more. OSU is responding to these challenges with the Marine Studies Initiative (MSI), which builds on the university’s deep history of nationally ranked programs in marine sciences and natural resources, faculty excellence, world-leading research and premier facilities. The MSI will position OSU as a global leader in 21st-century transdisciplinary education and research that leads to the development of strategies for the successful stewardship of the ocean and coasts.

The mission of the MSI is to support transdisciplinary research and teaching that emphasizes collaboration, experiential learning, problem-solving and community engagement. The three core themes align closely with the initiative’s primary goals of 1) providing transformational educational experiences centered on marine studies; 2) advancing leadership in transdisciplinary research and scholarship; and 3) increasing societal impact in Oregon and beyond.

The first goal involves creating an environment that expands innovative marine education and training opportunities for students, professionals and lifelong learners. This includes expanding collaborations with academic, government, nonprofit, Native American and industry partners; engaging students in seeking globally relevant solutions; and establishing a new marine studies degree program through the College of Liberal Arts that focuses on the human dimensions of marine systems through an emphasis on the social, political and cultural issues connected to the ocean.

The second goal entails pioneering transdisciplinary marine studies by building on OSU’s world-class marine research and scholarship, as well as forming networks that span scientific, political and socio-cultural disciplines. This includes strategic faculty hiring and increased programmatic support, as well as enhancing existing facilities and building new infrastructure to provide environments that encourage collaborations and leverage the university’s strengths.

The third goal involves implementing outreach and engagement approaches that are responsive to coastal needs, complement and enhance existing partnerships, and build on OSU’s success as a land, sea, space and sun grant university. This includes developing and implementing a road map for initiating and expanding partnerships with government agencies, nonprofits, Native American tribes, universities, community colleges, businesses and communities, as well as connecting the MSI with stakeholders and ensuring the program is responsive to statewide, national and international needs and interests. Through the formation of such partnerships, responses to issues and opportunities are co-created and thus strengthened by leveraging knowledge wherever it exists.
CHAPTER 2:
Resources and Capacity
ELIGIBILITY REQUIREMENTS 4 THROUGH 21

Eligibility Requirement 4 — Operational Focus and Independence:
Oregon State University’s mission is to conduct world-leading research and provide the highest quality of education for the people of Oregon and beyond. The institution is led by a president who is employed by, and accountable to, an independent 15-member Board of Trustees. The board’s mandated focus of oversight and policy determination is outlined in Oregon Senate Bill 270, Section 2.b. (2) and the bylaws of the board.

Eligibility Requirement 5 — Non-Discrimination:
OSU’s policy on discrimination and harassment provides guidance on the prevention of and response to such conduct, including the process for resolving claims of discrimination on the basis of race, color, national origin, religion, sex, gender identity (including gender expression), sexual orientation, disability, age, marital status, familial/parental status, income derived from a public assistance program, political beliefs, reprisals or retaliation for prior civil rights activity.

Eligibility Requirement 6 — Institutional Integrity:
OSU is committed to conducting its affairs in ways that promote mutual trust and public confidence as outlined in its University Code of Ethics. The institution strives for excellence in the pursuit of knowledge, maintains the highest standards in all activities and duties and provides a civil, respectful, nurturing environment while engaging in teaching, research, public service, and administration. All Oregon State employees, officers, students and volunteers acting on behalf of the university have a responsibility to work toward the fulfillment of the university’s mission and conduct themselves ethically, with the highest integrity and in compliance with all applicable laws, regulations and policies.

Eligibility Requirement 7 — Governing Board:
The OSU Board of Trustees governs the university in accordance with Senate Bill 270 and helps guide the university’s mission and core themes. The first 14 members of the board were confirmed by the Oregon Senate in November 2013. President Edward Ray is also a trustee (ex officio and nonvoting), for a total of 15 members. Voting members have no contractual or employment relationship or personal financial interest with the institution.

Eligibility Requirement 8 — Chief Executive Officer:
Dr. Edward Ray became OSU’s 14th president in 2003. The president is appointed and evaluated by the Board of Trustees. Per Resolution No. 18-07, the board delegates authority to undertake lawful activities to further the operation of the university. Ray serves as the full-time chief executive officer of the university. Neither the president nor any of his executive officers may serve as chair of the Board of Trustees.

Eligibility Requirement 9 — Administration:
OSU employs a sufficient number of administrative and support personnel to accomplish all of its primary and ancillary goals. The Office of the President and the Office of the Provost and Executive Vice President, as well as the academic and administrative units reporting to them, are fully supported by experienced, effective executive leadership and associated staff members. The University Cabinet, Provost’s Council of Deans and Provost’s Senior Leadership Team provide collaborative, effective, responsive and informed institutional leadership and serve as venues for shared strategic thinking and collaboration.
Eligibility Requirement 10 – Faculty:
OSU employs academic faculty to meet classroom teaching and research needs, as well as to include the most highly qualified faculty across academic disciplines. Faculty are regularly evaluated for promotion and tenure (as applicable) in accordance with institutional policy. Faculty are expected to be collegial members of their units and to perform appropriate service that contributes to the effectiveness of their departments, colleges, the university and their professions. In addition, faculty are expected to fully participate in the institution’s attainment of organizational objectives, as well as in the development of policy and curriculum. The university also employs professional faculty to administer and support academic and administrative support programs.

Eligibility Requirement 11 – Educational Program:
OSU’s outstanding faculty and academic programs consistently attract more high-achieving students than any other school in Oregon. Oregon State offers more than 200 undergraduate and 80 graduate degree programs through its 11 colleges, the Graduate School and the Honors College, one of only a handful of degree-granting honors programs in the U.S.

All programs are fully in sync with the institution’s stated goals, are based on recognized fields of academic study and are offered over a sufficient length of time to ensure learning outcomes are achieved. Learning outcome assessments are submitted to the Office of Academic Programs and Assessment, which develops high-quality, program-level assessment plans and provides structure for annual program-level assessment.

Eligibility Requirement 12 – General Education and Related Instruction:
OSU’s Baccalaureate Core (Bacc Core) curriculum represents the general educational component of all bachelor’s degree programs across the university. Informed by the natural and social sciences, the arts, and the humanities, the Bacc Core requires students to think critically and creatively and to synthesize ideas and information when evaluating major societal issues. Importantly, the Bacc Core promotes understanding of interrelationships among disciplines in order to increase students’ capacities as ethical citizens of an ever-changing world. Graduate programs bear field-specific requirements related to degree type.

OSU offers bachelor’s, master’s and doctoral degrees, as well as other programs of study to provide education that contains a core of related instruction or general education and that supports students’ personal and professional learning goals in their applicable field of specialization.

Eligibility Requirement 13 – Library and Information Resources:
The university libraries are dedicated to serving all students, faculty and staff. They enhance and support the university’s instructional and research programs with traditional and innovative services and collections.

The Valley Library, located in the center of the Corvallis campus, offers appealing spaces for individual study and collaborative work. After expansion and remodeling of the library was completed in 1999, the Valley Library was named Library of the Year by the American Library Association. The Marilyn Potts Guin Library in Newport houses the research and teaching collection of OSU’s Hatfield Marine Science Center. The OSU-Cascades Library provides library services to students, faculty and staff in Bend, with electronic access to all digital materials.
Eligibility Requirement 14 – Physical and Technological Infrastructure:
OSU’s campus in Corvallis is 570 acres, the campus at OSU-Cascades in Bend is expanding to 128 acres, and the OSU Portland Center branch fills the entire second floor of the downtown Meier & Frank Building. This infrastructure, along with that of the Hatfield Marine Science Center and the university’s network of Extension offices and experiment stations, is suitable to serve the mission of the university. OSU’s Division of Information and Technology builds and maintains a distributed technology ecosystem that enables scholarship, learning and community engagement in an environment where innovation and academic excellence thrive.

Eligibility Requirement 15 – Academic Freedom:
The faculty and administration of Oregon State University accept responsibility for maintaining an atmosphere in which employees and students may freely examine controversial issues and enjoy their protected rights to express personal opinion. University Policy: 580-022-0005 on academic freedom states, “All teachers in department institutions are entitled to freedom in the classroom in discussing subjects, but they should be careful not to introduce into their teaching controversial matter that has no relation to the subject.”

Eligibility Requirement 16 – Admissions:
Admissions policies are published in the online Academic Catalog and include qualifications and prerequisites necessary for all programs.

Eligibility Requirement 17 – Public Information:
OSU’s Academic Catalog is published online and is available to the public. The catalog includes a wealth of information about university operations and include course descriptions and degree requirements; descriptions of campus buildings and facilities, as well as a campus map in some editions; enumeration of tuition and fees; lists of faculty and administrators; and enrollment data.

Full details related to all Oregon State academic programs and courses are also available online, as are the names, titles and academic credentials of every administrator and faculty member, the rules on student conduct, student rights and responsibilities, lists of program tuition and fees, tuition refund policies and procedures, comprehensive financial aid information and the most up-to-date academic calendar.

Eligibility Requirement 18 – Financial Resources:
The provost and executive vice president and vice president for finance and administration share responsibility to ensure the fiscal and administrative health of the university. The university has a shared responsibility budget model that aligns the budget allocation process to support and advance the goals in the university’s strategic plan; recognizes the diverse academic missions of the academic colleges and centers; promotes interdisciplinary and collaborative teaching, research and outreach; and ensures the university is financially sound and can make long-term investments required for success. The Office of Budget and Fiscal Planning prepares and manages the Education and General Fund budget; provides collaborative budgetary assistance for all academic and administrative units; and prepares and distributes financial statements and reports in an open and transparent manner.

OSU encourages innovation and engages donors and the legislature to maintain sufficient cash flow, increase operating and capital funds and advance revenue growth, cost containment and financial stability.
Eligibility Requirement 19 – Financial Accountability:
OSU is externally audited annually, and a report is issued to its Board of Trustees. The audit complies with the standards applicable to financial audits contained in government auditing standards issued by the comptroller general. The report is based on the financial statements of OSU’s business-type activities and the aggregate presented component units of the university.

Eligibility Requirement 20 – Disclosure:
OSU accurately and fully discloses all relevant information requested for evaluation and accreditation purposes to the Northwest Commission on Colleges and Universities (NWCCU) in a timely manner and to the best of its ability. The university agrees that the commission disclose the nature of any action related to its accreditation status to any agency of the public requesting it.

Eligibility Requirement 21 – Relationship with the Accreditation Commission:
OSU agrees to comply with all NWCCU policies and standards and agrees with the commission’s authority to make known to any agency or members of the public the nature of any action regarding institutional status.
2.A GOVERNANCE

2.A.1 System of Governance

The institution demonstrates an effective and widely understood system of governance with clearly defined authority, roles and responsibilities. Its decision-making structures and processes make provision for the consideration of the views of faculty, staff, administrators and students on matters in which they have a direct and reasonable interest.

System of Shared Governance

Oregon State University embraces a shared governance model where faculty and administrators work together to develop academic policy and oversee the key academic functions of the university. The Faculty Senate is the academic governing body at OSU, representing academic and professional faculty in all academic and administrative units. Information about the Faculty Senate is online at the Faculty Senate website. The Faculty Senate has responsibility for academic policies, educational standards, curricula, academic regulations and faculty welfare. The Faculty Senate conducts its work through a Faculty Senate president, an executive committee, and 27 standing committees and councils. Issues move up through the committees and councils to the executive committee and president, and then are brought to the entire Faculty Senate for discussion and, when appropriate, vote. Additionally, the Faculty Senate president and executive committee meet regularly with the provost and host open sessions with the president each term. The Faculty Senate’s bylaws outline the authority and responsibility of the Faculty Senate, including its membership, process of elections and voting rights, and its officers, committees and structures. The bylaws also outline the function of the faculty forum, including making recommendations to university administration. There are 132 voting members of the Faculty Senate. The Faculty Senate recognizes and works closely with the authority, roles and responsibilities of the president, provost and executive vice president and their appointees via several avenues. Those include direct communication with Faculty Senate-sponsored committees such as the Administrative Appointments Committee, Budgets and Fiscal Planning Committee and numerous Faculty Senate committees with ex-officio members. The Faculty Senate also has ex-officio student representation and, consistent with policy, students are standing members on multiple key committees, including the Curriculum Council, Graduate Council and the Baccalaureate Core Committee.

The Associated Students of Oregon State University (ASOSU) and the Associated Students of Cascades Campus (ASCC) represent OSU students; promote self-government and leadership within the student body; and work with faculty and administration to enhance the students’ educational, social and cultural experiences. The ASOSU president, ASOSU assembly, ASCC President and ASCC assembly represent student perspectives and interests to university administration, and Senate leadership works directly with ASOSU/ASCC leaders. Student members are appointed to serve on various campus committees. For example, the ASOSU president is a member of the University Cabinet, and the ASCC vice president serves on the University Budget Committee. Under Oregon statute, OSU’s Board of Trustees includes a student who, similar to other board members, is appointed by the governor and confirmed by the Oregon Legislature (also see Standards 2.A.4 through 2.A.8 for more details regarding governance). The university
administration consults with the ASOSU and ASCC leadership on issues impacting students, including tuition and fees, student evaluation of teaching and other topics. There is a shared governance agreement between ASOSU and the university, signed by both presidents.

The Faculty Senate committees and councils demonstrate the spectrum and depth of leadership and faculty engagement in OSU governance, and clearly align to the university mission and core themes in the following ways:

- Core Theme 1, which is related to undergraduate education, is aligned with the Baccalaureate Core Committee, Curriculum Council (undergraduate) and the Undergraduate Admissions Committee.
- Core Theme 2, which is related to research and graduate education, is aligned with the Research Council, Graduate Admissions Committee and the Graduate Council.
- Core Theme 3, which is related to outreach and engagement, is aligned with the Online Education Committee, Curriculum Council and Research Council.
- There are other Faculty Senate committees that address both undergraduate and graduate education and are also aligned to OSU’s core themes: the Academic Regulations Committee, Academic Standing Committee, Academic Requirements Committee, Advancement of Teaching Committee, Computing Resources Committee, Diversity Council, Faculty Recognition and Awards Committee, Online Education Committee and Student Recognition and Awards Committee.

**Administrative Leadership Structures**

OSU has a defined administrative leadership structure that implements the academic policies delineated by the Faculty Senate. The university's administrative leadership also has budgetary and other ultimate decision-making authority around day-to-day management activities and outreach and engagement.

The president, as the chief executive officer of OSU, is responsible for the day-to-day leadership and direction of the university. The president is directly supported by a team consisting of the provost and executive vice president, who serves as the chief academic and operating officer; the vice president for finance and administration, who serves as the chief financial officer; the vice president for research, who provides oversight of the research enterprise and support infrastructure; the vice president and director of intercollegiate athletics, who provides oversight for athletics programs; the vice president and chief diversity officer, who oversees institutional diversity efforts; the vice president for university relations and marketing, who is responsible for marketing, communications and outreach (additional details about administrative leadership can be found in Standard 2.A.11). The vice president of OSU-Cascades, who serves as the chief executive officer for OSU-Cascades, reports to the provost and executive vice president. The administrative leadership is responsible for advancing the university’s mission, and it is charged with overseeing the administrative units and special initiatives supporting and advancing the goals of the university. Several other university administrators report directly to the president.

The alignment of the core themes of OSU to its administrative leadership structure can be summarized in the following way:

- Core Theme 1, related to undergraduate education, and Core Theme 2, related to research and graduate education, are aligned to the duties and functions of the following positions: senior vice provost for faculty affairs, the vice president for research, the vice president of OSU-Cascades, the vice provost for undergraduate education, the vice provost and dean of the Graduate School, the vice provost for student affairs, the vice provost for university information and technology, the senior
advisor to the provost for international affairs, the vice provost for enrollment management, and the associate provost for Ecampus.

- Core Theme 3, related to outreach and engagement, is aligned to the duties and functions of the following positions: the vice provost for outreach engagement and Extension and associate provost for Ecampus. The president, provost and executive vice president and administrative leadership also work closely with the OSU Foundation, the OSU Alumni Association and INTO OSU.

The system of governance is widely communicated to all stakeholders through several mechanisms, including public communications and internal communications, such as regular emails and the university’s policy manual. Email is a key tool to keep stakeholders updated and informed in the active governance process, including inviting engagement via surveys, Faculty Senate election ballots and announcement of meetings and events. A record of the provost and executive vice president’s mass communications are maintained online. Stakeholders are updated regularly, are informed of the goals and intended outcomes of change, and are told what the change means with respect to processes and reporting lines and oversight.

The administration and organization of the university are described in the Academic Catalog and in the Office of the Provost website. The catalog also provides academic regulations and many other details for the operation of the university. The faculty handbook provides guidance for faculty, including faculty governance and organizations. The organizational charts related to governance are the following:

- The organizational chart for the Office of the President
- The organizational chart of the Division of Finance and Administration (as of November 2018)
- The organizational chart of the Office of the Provost
- Descriptions and structures of the units reporting to the Office of the Provost
- The organizational chart related to INTO OSU

Consideration of Views
OSU’s administrative and Faculty Senate leadership deeply value stakeholder input. They use multiple avenues to obtain the broad and diverse views of faculty, staff, administrators and students on matters in which they have a direct and reasonable interest. In addition to the 27 Faculty Senate committees and councils described above, which comprise faculty, students and administrative leadership, the institution has multiple additional administrative advisory councils that include stakeholder representation from these same constituencies. Those include the President’s and Provost’s Leadership Council for Diversity, Inclusion and Social Justice; the Data Governance Council; the University Budget Committee; the Information Technology Strategies Committee; the President’s Council on the Status of Women; and the University Council for Student Engagement and Experience.

During most of the current accreditation cycle, OSU has been guided by its 2014-18 strategic plan (SP3.0: Focus on Excellence), which was developed through a highly deliberative process that engaged faculty, staff, students and external stakeholders. Details of the process and the communication of this plan were disseminated throughout the campus community. The Strategic Plan Steering Committee conducted nine open forums to seek university-wide input. The results of the effort were communicated broadly through campus presentations and through online media. In 2018, OSU followed a similar process to develop its 2019-23 plan, SP4.0: Transformation, Excellence and Impact. SP4.0 launched in January 2019.
2.A.2 Multi-Campus Governance

In a multi-unit governance system, the division of authority and responsibility between the system and the institution is clearly delineated. System policies, regulations and procedures concerning the institution are clearly defined and equitably administered.
State of Oregon statutory changes effective in 2014 and 2015 transitioned the public universities in Oregon from a system governed by the State Board of Higher Education to independent governing boards, and the Oregon University System and State Board of Higher Education were ultimately dissolved. Under these statutes, the Board of Trustees of Oregon State University is vested with the power and authority to govern the university.¹ By resolution, the board delegates the day-to-day operations of the university to the president, with the exception of activities reserved to the board.² As Oregon’s land grant university, OSU has a statewide presence that includes campuses in Corvallis and Bend, centers in Portland and Newport, OSU Extension Service locations in every Oregon county, research and Extension centers, agricultural experiment stations and forest research laboratory sites at locations across the state, including Ecampus which spans the entire state and beyond. The university has administrators who provide leadership and management across the major support, operational and academic functions of the university (see NWCCU Standard 2.A.11 for more details).

Though no longer part of a university system, public universities in Oregon must cooperate with the Higher Education Coordinating Commission (HECC) also established in the 2014 statutory provisions. The coordinating role of HECC is delineated in statute³ and implemented in HECC-adopted administrative rules.⁴ HECC’s roles include responsibility for submission of a consolidated funding request to the governor on behalf of all public universities in Oregon, review of undergraduate resident tuition increases greater than 5 percent at public institutions, review and approval of significant changes in academic programs and the adoption of an allocation formula for distributing certain state appropriations to community colleges and public universities.

Exhibits 2.A.2

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<thead>
<tr>
<th>#</th>
<th>Evidence Link</th>
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<tr>
<td>1</td>
<td>Oregon Revised Statutes Governing Boards of Public Universities <a href="oregonlegislature.gov/bills_laws/ors/ors352.html">Oregon Revised Statutes Governing Boards of Public Universities</a></td>
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<td>Delegation of Authority to the President <a href="leadership.oregonstate.edu/sites/leadership.oregonstate.edu/files/181026_amended_delegation_of_authority.pdf">Delegation of Authority to the President</a></td>
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<td>3</td>
<td>Oregon Revised Statutes Regarding Statewide Coordination of Higher Education <a href="oregonlegislature.gov/bills_laws/ors/ors350.html">Oregon Revised Statutes Regarding Statewide Coordination of Higher Education</a></td>
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<td>4</td>
<td>Higher Education Coordinating Commission Administrative Rules and Statutes <a href="oregon.gov/highered/about/Pages/rules-statutes.aspx">Higher Education Coordinating Commission Administrative Rules and Statutes</a></td>
</tr>
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2.A.3 Compliance with Commission Standards

The institution monitors its compliance with the Commission’s Standards for Accreditation, including the impact of collective bargaining agreements, legislative actions, and external mandates.

Compliance with Commission Standards

The institution monitors compliance with the commission’s standards through several avenues. The primary accreditation compliance oversight belongs to the Office of the Provost, where the senior vice provost for faculty affairs and accreditation liaison officer (ALO) is responsible for communicating with NWCCU and providing guidance on accreditation compliance responsibilities to other units within OSU.¹
The director of University Accreditation oversees university-wide accreditation efforts and is a trained NWCCU peer evaluator. The representatives from the provost’s office regularly attend NWCCU trainings and conferences, and report changes to the campus via committees and direct communication. The Accreditation Project Team meets bi-weekly to coordinate accreditation and assessment, and to develop communication and compliance with commission standards.

**Collective Bargaining**

The Office of Human Resources provides bargaining contract administration, interpretation and assistance to the campus. The president, the Office of Human Resources and its staff regularly meet with the Service Employees International Union (SEIU) and the Coalition of Graduate Employees (CGE) leadership on campus to discuss and consult on major institutional issues.

Approximately 1,600 SEIU-represented employees work at OSU, making OSU the largest employer within the bargaining unit. Although there is no longer a university system, the statutes require OSU to bargain as a system until at least 2019. The 2015-19 bargaining agreement was completed in September 2015. The four-year contract contained a 2017 economic reopener; the economic negotiations were concluded in August 2017. OSU’s Office of Human Resources represents OSU at the bargaining table, which is led by labor counsel from the University Shared Services Enterprise (USSE).

Graduate assistants are represented by the Coalition of Graduate Employees (CGE). Between 900 to 1,700 graduate assistants are employed through the year. The 2016-20 CGE bargaining agreement had a reopener in January 2018 and the Office of Human Resources, Employee and Labor Relations unit completed negotiations with the union in June 2018. Contract ratification occurred October 26, 2018.

United Academics (UA) conducted a unionization campaign for instructional and research faculty at OSU. In May 2018, the Oregon Employment Relations Board certified UAOSU as representing faculty at OSU.

**Legislative Actions and External Mandates**

The president and provost, with advice from the Office of General Counsel, oversee compliance related to local, state and federal law. They, in partnership with the vice president for OSU-Cascades and the associate provost for Ecampus, also oversee compliance related to branch campuses and distance education.

Table 2.A.3

| OSU Accreditation Project Team Committee Members | • Susan Capalbo, Senior Vice Provost, Faculty Affairs, Accreditation Steering Committee Chair and Accreditation Liaison Officer
| | • Gigi Bruce, Special Assistant to the Provost and Executive Vice President
| | • JoAnne Bunnage, Director, University Accreditation
| | • Salvador Castillo, Director, Institutional Research
| | • Sara Daly, Executive Assistant to the Senior Vice Provost for Faculty Affairs
| | • Michelle Klotz, Faculty Affairs Associate
| | • Emilie Ratcliff, Accreditation Assistant |

(leadership.oregonstate.edu/provost/university-accreditation)
### OSU Accreditation Steering Committee Members

- Susan Capalbo, Senior Vice Provost, Faculty Affairs and Steering Committee Chair and Accreditation Liaison Officer
- Stephanie Bernell, Associate Dean, Graduate School
- Steven Clark, Vice President, University Relations and Marketing
- Debbie Colbert, Board of Trustees Secretary
- Robert Cowen, Director, Hatfield Marine Science Center
- Jon Dolan, Interim Vice Provost, Information and Technology
- Alix Gitelman, Vice Provost, Undergraduate Education
- Michael Green, Vice President, Finance and Administration
- Julie Greenwood, Associate Provost, Transformative Learning
- Carlos Jensen, Associate Dean and Associate Professor, College of Engineering
- Becky Johnson, Vice President, OSU-Cascades
- Dan Larson, Interim Vice Provost, Student Affairs
- Robert Mason, Professor, College of Science
- Dwaine Plaza, Faculty Senate President Elect and Professor, College of Liberal Arts
- Scott Reed, Vice Provost, University Outreach and Engagement
- Staci Simonich, Associate Vice President, Research
- Aiden Tariku, Vice President, ASOSU
- Susan Tornquist, Dean, Carlson College of Veterinary Medicine
- Irem Tumer, Interim Vice President, Research
- Gigi Bruce, Special Assistant to the Provost (ex officio)
- JoAnne Bunnage, Director, University Accreditation (ex officio)
- Salvador Castillo, Director, Institutional Research (ex officio)
- Sara Daly, Executive Assistant to the Senior Vice Provost (ex officio)
- Michelle Klotz, Faculty Affairs Associate (ex officio)
- Emilie Ratcliff, Accreditation Assistant (ex officio)

(leadership.oregonstate.edu/provost/university-accreditation)
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<th>Student Accreditation Advisory Council (SAAC)</th>
<th>Kiana Barr, Undergraduate, Human Development and Family Sciences and Public Health (General Option)</th>
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<tr>
<td></td>
<td>Sonya Bedge, Undergraduate, BioResource Research, Chemistry and Toxicology</td>
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<td>Amanda Dardis, Undergraduate, Nutrition (Dietetics) and Public Health</td>
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<td>Weam Elsheikh, Graduate, College Student Services Administration</td>
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<td>Lisa Fernandez, Graduate, Women, Gender and Sexuality Studies (Co-Chair)</td>
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<td>Daniel Frentress, Undergraduate, Liberal Arts Education, Psychology and Spanish</td>
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<td>Aleysa Garcia Rivas, Undergraduate, Public Health and Ethnic Studies</td>
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<td>Amber Nicole Hill, Graduate, Doctor of Pharmacy (Pharm.D.)</td>
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<td>Taniah Johnson, Undergraduate, Human Development and Family Sciences (Ecampus)</td>
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<td>Brenda Ledezma, Undergraduate, Human Development and Family Sciences and Pre-Education</td>
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<td>Hamza Molvi, Undergraduate, Marketing and Business Information Systems (Honors College) (Co-Chair)</td>
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<td>Mohammed Shakibnia, Undergraduate, Political Science and Philosophy</td>
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<td>Taylor Stokes, Undergraduate, Natural Resources, Management and Sustainability</td>
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<td>Wyatt Swick, Undergraduate, Business, Accounting</td>
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<td></td>
<td>Fatima Taha, Graduate, Geography (Co-Chair)</td>
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<td></td>
<td>Emily Unrau, Undergraduate, Agriculture Business Management and Animal Science</td>
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<td>Wyatt Weaver, Undergraduate, Mechanical Engineering</td>
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<td></td>
<td>Laura Whalen, Undergraduate, Human Development and Family Sciences and Public Health (Ecampus)</td>
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(leadership.oregonstate.edu/provost/student-accreditation-advisory-council-saac)
### RESOURCES AND CAPACITY

| Office of the President: Government Relations | • Government Relations Director  
(government.oregonstate.edu/state-and-local-government-relations)  
• Federal Relations Director  
(government.oregonstate.edu/federal-relations)  
• Government Relations Coordinator |
| Office of Audit, Risk and Compliance | Chief Audit, Risk and Compliance Executive  
(leadership.oregonstate.edu/compliance) |
| Collective Bargaining Units Across OSU | Service Employees International Union (SEIU) Local 503  
United Academics of Oregon State University (UAOSU)  
Coalition of Graduate Employees (CGE) |
| Current Collective Bargaining Agreements | Service Employees International Union (SEIU) Local 503  
(usse-oregon.org/sites/default/files/uploadedFiles/11302015/2015-17%20CBA%20Final%20w-revised%20cover.pdf)  
Coalition of Graduate Employees (CGE)  
(hr.oregonstate.edu/sites/hr.oregonstate.edu/files/ercc/gradstud/2016-2020cba.pdf) |
| State Authorization and Complaint Resolution | ecampus.oregonstate.edu/services/doe-compliance.htm |

#### Exhibits 2.A.3

<table>
<thead>
<tr>
<th>#</th>
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<td>University Accreditation</td>
<td>leadership.oregonstate.edu/provost/university-accreditation</td>
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<td>2</td>
<td>Office of Human Resources</td>
<td>hr.oregonstate.edu</td>
</tr>
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<td>3</td>
<td>SEIU Local 503/Sub-Local 083 at Oregon State University</td>
<td>local083.seiu503.org</td>
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<td>4</td>
<td>Graduate Employee CGE Contract Resources</td>
<td>hr.oregonstate.edu/policies-procedures/administrators/graduate-employee-cge-contract-resources</td>
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<td>6</td>
<td>Collective Bargaining Agreement: CGE</td>
<td>hr.oregonstate.edu/sites/hr.oregonstate.edu/files/ercc/gradstud/2016-2020cba.pdf</td>
</tr>
</tbody>
</table>
2.A.4 Governing Board – Constitution and Role

The institution has a functioning governing board consisting of at least five voting members, a majority of whom have no contractual, employment or financial interest in the institution. If the institution is governed by a hierarchical structure of multiple boards, the roles, responsibilities and authority of each board — as they relate to the institution — are clearly defined, widely communicated and broadly understood.

The Oregon State University Board of Trustees is vested by law with the power and authority to govern the university, and the composition of the board is set out in state statute. Trustees are appointed by the governor and confirmed by the Oregon Legislature. The number of trustees authorized by law ranges from a minimum of 11 to a maximum of 15, and the actual number of trustees within this range is fixed or changed by the governor. Trustees may not be appointed to serve more than two consecutive full terms. The board consists of the following members:

- The president of the university, serving as an ex officio, nonvoting member.
- A student enrolled at the university, serving a two-year term as a voting member.
- A member of the faculty, serving a two-year term either as a voting or nonvoting member as set by the governor.
- A nonfaculty staff member, serving a two-year term as a voting or nonvoting member as set by the governor.
- The remaining trustees serve at large with terms of four years.

The biographies of current board members are provided online. Table 2.A.4 provides a list of Board of Trustees terms of appointment.

All board members are expected to act with the highest level of integrity and to serve as a model of ethical governance. These expectations are set out in the Statement of Mission, Principles and Core Values, Trustees Code of Ethics and Trustee Conflicts of Interest and Recusal.

These policies regulate board members’ conduct with respect to conflicts of interest, confidential information and receipt of gifts. Board members are also subject to Oregon Government Ethics law, which includes the requirement to file annually a statement of economic interest with the Oregon Government Ethics Commission.

Table 2.A.4: Composition of the OSU Board of Trustees (as of June 4, 2018)

<table>
<thead>
<tr>
<th>Board Member</th>
<th>Terms of Appointment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mike Bailey (OSU Faculty)</td>
<td>Initial appointment: 2016-17</td>
</tr>
<tr>
<td></td>
<td>1st full term: 2017-19</td>
</tr>
<tr>
<td>Mark Baldwin (OSU Staff)</td>
<td>Initial appointment: 2013-15</td>
</tr>
<tr>
<td></td>
<td>1st full term: 2015-17</td>
</tr>
<tr>
<td></td>
<td>2nd full term: 2017-19</td>
</tr>
</tbody>
</table>
### RESOURCES AND CAPACITY

<table>
<thead>
<tr>
<th>Name</th>
<th>Initial appointment:</th>
<th>1st full term:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patricia M. Bedient</td>
<td>2013015</td>
<td>2015-19</td>
</tr>
<tr>
<td>Rani Borkar</td>
<td>2013-17</td>
<td>2017-21</td>
</tr>
<tr>
<td>Julia Brim-Edwards</td>
<td>2016-17</td>
<td>2017-21</td>
</tr>
<tr>
<td>Darald W. Callahan</td>
<td>2013-15</td>
<td>2015-19</td>
</tr>
<tr>
<td>Michele Longo Eder</td>
<td>2013-15</td>
<td>2015-19</td>
</tr>
<tr>
<td>Paul J. Kelly, Jr.</td>
<td>2013-07</td>
<td>2017-21</td>
</tr>
<tr>
<td>Angel Mandujano-Guevara (Student)</td>
<td>2016-19</td>
<td></td>
</tr>
<tr>
<td>Julie Manning</td>
<td>2017-19</td>
<td></td>
</tr>
<tr>
<td>Laura Naumes</td>
<td>2013-15</td>
<td>2015-19</td>
</tr>
<tr>
<td>Preston Pulliams</td>
<td></td>
<td>2015-19</td>
</tr>
<tr>
<td>Edward Ray</td>
<td></td>
<td>Nonvoting Ex Officio</td>
</tr>
<tr>
<td>Kirk E. Schueler</td>
<td>2013-17</td>
<td>2017-21</td>
</tr>
<tr>
<td>Michael G. Thorne</td>
<td>2014-17</td>
<td>2017-21</td>
</tr>
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</table>

### Exhibits 2.A.4

<table>
<thead>
<tr>
<th>#</th>
<th>Evidence Link</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td><a href="https://oregonlegislature.gov/bills_laws/ors/ors352.html">Oregon Revised Statutes Governing Board of Public Universities: OAR Chapter 352 — Public Universities</a></td>
</tr>
<tr>
<td>2</td>
<td><a href="leadership.oregonstate.edu/trustees/about-board/trustees">OSU Board of Trustees Biographies</a></td>
</tr>
<tr>
<td>3</td>
<td><a href="leadership.oregonstate.edu/sites/leadership.oregonstate.edu/files/trustees/agendas-minutes/170421_adopted_statement_of_mission_principles_and_core_values.pdf">OSU Board of Trustees Statement of Mission, Principles and Core Values</a></td>
</tr>
<tr>
<td>4</td>
<td><a href="leadership.oregonstate.edu/sites/leadership.oregonstate.edu/files/trustees/Policies/140313_adopted_trustee_code_of_ethics.pdf">Trustee Code of Ethics</a></td>
</tr>
</tbody>
</table>
### 2.A.5 Governing Board – Allocation of Authority

The board acts only as a committee of the whole; no member or subcommittee of the board acts on behalf of the board except by formal delegation of authority by the governing board as a whole.

The Board of Trustees exercises its authority as a committee of the whole and has adopted bylaws to establish a governance structure for the conduct of board business. The bylaws define the duties, authority limits and principal operating procedures for the board and its trustees. Pursuant to these bylaws, the board's authority is vested in the board collectively and not in any individual trustee. Individual trustees do not speak on behalf of the board unless authorized to do so by the board or the chair. The chair is delegated authority to speak on behalf of the board, unless otherwise determined by the board. These expectations are reinforced in the board's policy on the responsibilities of individual trustees. Except as otherwise specified in its bylaws, or where the board authorizes a committee to act, a quorum of the board is required to make a decision or to deliberate toward a decision on any matter. A quorum of the board is a majority of the voting and nonvoting trustees in office at the time of the meeting.

The board may delegate and provide for the further delegation of any and all powers and duties, subject to limitations expressly set forth in law. By resolution, the board delegates the day-to-day operations of the university to the president, with the exception of activities reserved to the board. This delegation of authority is reviewed annually by the board. The board also operates three standing committees with charters that establish each committee's specific areas of responsibility. These committees are the Executive and Audit Committee, Academic Strategies Committee and Finance and Administration Committee. By charter, the Executive and Audit Committee is empowered to act for the board in case of emergency between regular board meetings.

Exhibits 2.A.5: Governing Board – Allocation of Authority Evidence

<table>
<thead>
<tr>
<th>#</th>
<th>Evidence Link</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Board Bylaws <a href="leadership.oregonstate.edu/sites/leadership.oregonstate.edu/files/trustees/Policies/171020_amended_bylaws.pdf">leadership.oregonstate.edu/sites/leadership.oregonstate.edu/files/trustees/Policies/171020_amended_bylaws.pdf</a></td>
</tr>
<tr>
<td>2</td>
<td>Responsibilities of Individual Trustees <a href="leadership.oregonstate.edu/sites/leadership.oregonstate.edu/files/trustees/Policies/140313_adopted_responsibilities_of_individual_trustees.pdf">leadership.oregonstate.edu/sites/leadership.oregonstate.edu/files/trustees/Policies/140313_adopted_responsibilities_of_individual_trustees.pdf</a></td>
</tr>
<tr>
<td>3</td>
<td>Delegating Authority to the University <a href="leadership.oregonstate.edu/sites/leadership.oregonstate.edu/files/181026_amended_delegation_of_authority.pdf">leadership.oregonstate.edu/sites/leadership.oregonstate.edu/files/181026_amended_delegation_of_authority.pdf</a></td>
</tr>
<tr>
<td>4</td>
<td>Standing Committees <a href="leadership.oregonstate.edu/sites/leadership.oregonstate.edu/files/trustees/Policies/140313_adopted_standing_committees.pdf">leadership.oregonstate.edu/sites/leadership.oregonstate.edu/files/trustees/Policies/140313_adopted_standing_committees.pdf</a></td>
</tr>
</tbody>
</table>
RESOURCES AND CAPACITY


The board establishes, reviews, revises and exercises oversight of institutional policies, including those regarding its own organization and operation.

The Board of Trustees has adopted bylaws to establish the governance structure for the conduct of board business. The board has also adopted a number of additional policies that guide its organization and operations. These policies are regularly reviewed by the board and updated to reflect changes in statutes and practices and as new circumstances arise.

By resolution, the board delegates the day-to-day operations of the university to the president, with the exception of activities reserved to the board as described in Standard 2.A.5. Under this delegation of authority, the president is responsible for establishing and regularly reviewing, and revising as necessary, the university policy and standards. When the Oregon University System (OUS) was dissolved by the Oregon Legislature in 2014, OSU became a separate legal entity and, by operation of law, hundreds of State Board of Higher Education, Oregon Administrative Rules (OARs), Internal Management Directives (IMDs) and other policies continued to apply to OSU unless and until changed. OSU readopted the relevant policies as either university policies, which govern the community of faculty, staff and students; or university standards, which govern all individuals and have the force of law. These newly named policies and standards were added to a number of other preexisting university-wide policies. To fully transition to OSU-specific university policies and standards, and to begin gathering those other preexisting OSU-specific policies, OSU has developed a University Policy and Standards Manual (UPSM) and established a new process for developing, amending and retiring policies. The university is reviewing each university policy and standard, continuing to gather and review other preexisting OSU-specific and university-wide policies and working with relevant parties to amend, retire or introduce new policies as necessary. This is a significant and multi-year undertaking that is guided by a strategic plan to ensure its completion.

Exhibits 2.A.6

<table>
<thead>
<tr>
<th>#</th>
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<tbody>
<tr>
<td>1</td>
<td>leadership.oregonstate.edu/sites/leadership.oregonstate.edu/files/trustees/Policies/171020_amended_bylaws.pdf</td>
</tr>
<tr>
<td>2</td>
<td>leadership.oregonstate.edu/sites/leadership.oregonstate.edu/files/trustees/Policies/140313_adopted_responsibilities_of_individual_trustees.pdf</td>
</tr>
</tbody>
</table>
The board selects and evaluates regularly a chief executive officer who is accountable for the operation of the institution. It delegates authority and responsibility to the CEO to implement and administer board-approved policies related to the operation of the institution.

Under Oregon Revised Statute Chapter 352.096, the Board of Trustees is responsible for appointing and employing the president, in consultation with the governor, or the governor’s designee. This statute also specifies that the board prescribes the compensation, reappointment and removal of the president. The board has adopted policies that guide the search and selection of the president, assessment of the president’s performance and compensation for the president. Data for assessments are included in Table 2.A.7. As described in Standard 2.A.5, the board delegates the operations of the university to the president, with the exception of activities reserved to the board.

Table 2.A.7: Assessment Data (e.g., Indicators/Metrics and Source)

<table>
<thead>
<tr>
<th>Assessments</th>
<th>Evidence Link</th>
</tr>
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<tbody>
<tr>
<td>2018 Presidential Annual Assessment</td>
<td>leadership.oregonstate.edu/sites/leadership.oregonstate.edu/files/tab_c_board_chair_rpt_fy2018_pres_assessment.pdf</td>
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<tr>
<td>2017 Presidential Annual Assessment</td>
<td>leadership.oregonstate.edu/sites/leadership.oregonstate.edu/files/trustees/agendas-minutes/tab_b_board_chair_rpt_fy2017_pres_assessment.pdf</td>
</tr>
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</table>
2016 Presidential Comprehensive Assessment  
leadership.oregonstate.edu/sites/leadership.oregonstate.edu/files/trustees/agendas-minutes/tab_b_board_officers_rpt_fy2016_pres_assessment.pdf

2015 Presidential Annual Assessment  
leadership.oregonstate.edu/sites/leadership.oregonstate.edu/files/trustees/agendas-minutes/tab_f_draft_board_officers_rpt_fy2015_pres_assessment.pdf

Exhibits 2.A.7

<table>
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<th>#</th>
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<td>leadership.oregonstate.edu/sites/leadership.oregonstate.edu/files/trustees/Policies/161021_adopted_presidential_search_and_selection_guidelines.pdf</td>
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<td>leadership.oregonstate.edu/sites/leadership.oregonstate.edu/files/trustees/Policies/160129_adopted_presidential_compensation_philosophy.pdf</td>
</tr>
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2.A.8 Governing Board – Performance Review

The board regularly evaluates its performance to ensure its duties and responsibilities are fulfilled in an effective and efficient manner.

As required in its bylaws, the Board of Trustees must periodically assess the performance of the board, its committees and members. In 2015, the board initiated a self-assessment survey instrument, which is designed for trustees to candidly assess how they are doing as trustees and as a board. The survey questions address four areas: 1) the board, 2) committees, 3) individual trustees, and 4) board operations. Within each area, trustees respond to questions related to engagement, support, culture/relationships, satisfaction, communication, leadership, responsibility and performance.

Each year, the self-assessment results are discussed at a meeting of the full board as well as within meetings of each of the committees. Assessment data is included in Table 2.A.8. The feedback from the survey informs annual work plans for the board and committees and identifies any changes needed to ensure effective board operations. The board pairs its review of the survey results with an annual “refresher” presentation by the vice chair on the fundamentals of board governance, including a review of the fiduciary responsibilities of the board, responsibilities of individual trustees and ethics and conflicts of interest.
### Table 2.A.8: Assessment Data (e.g., Indicators/Metrics and Source)

<table>
<thead>
<tr>
<th>Data</th>
<th>Evidence Link</th>
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<td>2018 Board Self-Assessment Results</td>
<td><a href="leadership.oregonstate.edu/sites/leadership.oregonstate.edu/files/tab_x_2019_bot_work_plan_2018_assessment.pdf">leadership.oregonstate.edu/sites/leadership.oregonstate.edu/files/tab_x_2019_bot_work_plan_2018_assessment.pdf</a></td>
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<td><a href="leadership.oregonstate.edu/sites/leadership.oregonstate.edu/files/tab_f_2019_eac_work_plan.pdf">leadership.oregonstate.edu/sites/leadership.oregonstate.edu/files/tab_f_2019_eac_work_plan.pdf</a></td>
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<td><a href="leadership.oregonstate.edu/sites/leadership.oregonstate.edu/files/tab_d_2019_asc_work_plan.pdf">leadership.oregonstate.edu/sites/leadership.oregonstate.edu/files/tab_d_2019_asc_work_plan.pdf</a></td>
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### Exhibits 2.A.8

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<td><a href="leadership.oregonstate.edu/sites/leadership.oregonstate.edu/files/tab_aa_refresher_on_fundamentals_of_board_governance.pdf">leadership.oregonstate.edu/sites/leadership.oregonstate.edu/files/tab_aa_refresher_on_fundamentals_of_board_governance.pdf</a></td>
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### 2.A.9 Leadership and Management

The institution has an effective system of leadership, staffed by qualified administrators, with appropriate levels of responsibility and accountability, who are charged with planning, organizing, and managing the institution and assessing its achievements and effectiveness.

Oregon State University’s administration is organized to effectively sustain all functions of the university, including its teaching, research and outreach and engagement missions. The University Cabinet provides effective, responsive and informed institutional leadership and serves as a venue for shared strategic thinking and collaboration. Cabinet members serve at the invitation of the president. The current roster includes:

- President Edward Ray
- Provost and Executive Vice President Ed Feser
- Vice President, Finance and Administration Michael Green
- Vice President, Research (Interim) Irem Tumer
- Vice President, University Relations and Marketing Steven Clark
- Vice President and Director, Intercollegiate Athletics Scott Barnes
- Vice President and Chief Diversity Officer Charlene Alexander
- Vice Provost, Student Affairs (Interim) Dan Larson
- Senior Vice Provost, Faculty Affairs Susan Capalbo
- Board of Trustees Secretary Debbie Colbert
- President, OSU Foundation Mike Goodwin
RESOURCES AND CAPACITY

- General Counsel [ex officio] Rebecca Gose
- President, ASOSU Justin Bennett
- Executive Director, Equal Opportunity and Access Kim Kirkland
- Faculty Senate President Mina Carlson
- Director, Government Relations Jock Mills
- Vice Provost, University Outreach and Engagement Scott Reed
- Chief Audit, Risk and Compliance Executive [ex officio] Patti Snopkowski
- Dean, College of Public Health and Human Sciences Javier Nieto
- Chief Human Resources Officer Cathy Hasenpflug
- Chief Assistant to the President and Assistant Board Secretary Jennifer Almquist

University administrative organizational charts are found online.¹

The provost’s senior leadership team consists of the administrators charged with overseeing the administrative units and special initiatives supporting and advancing the academic goals of the university.²

The provost’s council of deans consists of the provost, the college deans and the vice president for OSU-Cascades, with the senior vice provost and the special assistant to the provost attending meetings.³

Exhibits 2.A.9

<table>
<thead>
<tr>
<th>#</th>
<th>University Administrative Organizational Charts</th>
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<th>Provost’s Senior Leadership Team</th>
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<td>leadership.oregonstate.edu/provost/senior-leadership-team</td>
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<thead>
<tr>
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<th>Provost’s Council of Deans</th>
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<td>3</td>
<td>leadership.oregonstate.edu/provost/provosts-council-deans</td>
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2.A.10 Leadership and Management — Chief Executive Officer

The institution employs an appropriately qualified chief executive officer with full-time responsibility to the institution. The chief executive officer may serve as an ex officio member of the governing board, but may not serve as its chair.

The president,¹ as the full-time chief executive officer, is responsible for the overall leadership of the university. The president serves as an ex officio, nonvoting member of the OSU Board of Trustees. Dr. Edward Ray currently serves as president of Oregon State University.² Hired in 2003, Dr. Ray has an extensive background in higher education and leadership. He came to OSU after 33 years at The Ohio State University, where he held various academic administrative positions, including executive vice president and provost. Dr. Ray is highly respected within the state and nationally, and he serves or has served on boards of the American Council on Education, the Association of American Colleges and Universities, the Association of Public and Land Grant Universities and the National Collegiate Athletic Association (NCAA).
Exhibits 2.A.10

<table>
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</tr>
<tr>
<td>2</td>
<td>leadership.oregonstate.edu/president/biography</td>
</tr>
</tbody>
</table>

2.A.11 Leadership and Management – Leadership Positions

The institution employs a sufficient number of qualified administrators who provide effective leadership and management for the institution’s major support and operational functions and work collaboratively across institutional functions and units to foster fulfillment of the institution’s mission and accomplishment of its core theme objectives.

Office of the Provost: Provost, Vice Presidents and Vice Provosts

The provost and executive vice president is the chief academic and operating officer of Oregon State University, charged by the president to oversee progress on the university’s strategic goals in student success, faculty excellence, outreach and engagement, internationalization and institutional reputation. In partnership with the vice president for finance and administration, the provost ensures that the financial resources and administrative and physical infrastructure of OSU are closely aligned with its mission as a leading land grant university with a focus on inclusive excellence and the deep integration of teaching, research and outreach and engagement.

The provost’s senior leadership team consists of the leaders charged with overseeing the administrative units and special initiatives supporting and advancing the academic goals of the university.

Vice presidents and vice provosts are responsible for the operational areas that support the university’s mission and goals, and report directly to the president or the provost. These positions provide effective leadership and management of the institution’s major support and operational functions. These positions also work collaboratively across the organizational structures to foster the fulfillment of the institution’s core themes, objectives and mission. Table 2.A.11 below provides a list of OSU’s vice presidents and vice provosts along with a list of qualifications (terminal credentials), years of service in current positions and links to biographical information.

Table 2.A.11: Current OSU Vice Presidents and Vice Provosts and Their Qualifications

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Terminal Credentials</th>
<th>In Current Position Since</th>
<th>Biographic Information</th>
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</thead>
<tbody>
<tr>
<td>Edward Ray</td>
<td>President</td>
<td>Ph.D. Economics, Stanford University</td>
<td>2003</td>
<td>leadership.oregonstate.edu/president/biography</td>
</tr>
<tr>
<td>Edward Feser</td>
<td>Provost and Executive Vice President</td>
<td>Ph.D. Regional Planning, University of North Carolina at Chapel Hill</td>
<td>2017</td>
<td>leadership.oregonstate.edu/provost/about/provost-edward-feser</td>
</tr>
<tr>
<td>Name</td>
<td>Position</td>
<td>Degree and Institution</td>
<td>Year</td>
<td>Link</td>
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<td>-----------------------------------------------</td>
<td>--------------------------------------------------------------</td>
<td>-------</td>
<td>----------------------------------------------------------------------</td>
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<tr>
<td>Charlene Alexander</td>
<td>Vice President and Chief Diversity Officer</td>
<td>Ph.D. Counseling Psychology, University of Nebraska-Lincoln</td>
<td>2017</td>
<td>leadership.oregonstate.edu/people/charlene-alexander</td>
</tr>
<tr>
<td>Scott Barnes</td>
<td>Vice President and Director, Intercollegiate Athletics</td>
<td>M.S. Athletics Administration and Physical Education, Fresno State University</td>
<td>2016</td>
<td>osubeavers.com/staff.aspx?staff=440</td>
</tr>
<tr>
<td>Noah Buckley</td>
<td>Associate Provost, Enrollment Management (Interim)</td>
<td>MBA, University of Wyoming</td>
<td>2018</td>
<td>leadership.oregonstate.edu/people/noah-buckley</td>
</tr>
<tr>
<td>Steven Clark</td>
<td>Vice President, University Relations and Marketing</td>
<td>B.S. Journalism, Oregon State University</td>
<td>2011</td>
<td>leadership.oregonstate.edu/people/steven-clark</td>
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<tr>
<td>Alix Gitelman</td>
<td>Vice Provost, Undergraduate Education</td>
<td>Ph.D. Statistics, Carnegie Mellon University</td>
<td>2018</td>
<td>apli.oregonstate.edu/leadership</td>
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<tr>
<td>Michael Green</td>
<td>Vice President, Finance and Administration</td>
<td>B.S. Business Administration, Oregon State University</td>
<td>2017</td>
<td>leadership.oregonstate.edu/people/michael-green</td>
</tr>
<tr>
<td>Becky Johnson</td>
<td>Vice President, Oregon State University–Cascades</td>
<td>Ph.D. Agricultural Economics, Michigan State University</td>
<td>2009</td>
<td>osucascades.edu/leadership/vice-president</td>
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<td>Irem Tumer</td>
<td>Vice President, Research (Interim)</td>
<td>Ph.D. Mechanical Engineering, The University of Texas at Austin</td>
<td>2018</td>
<td>leadership.oregonstate.edu/people/irem-tumer</td>
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<tr>
<td>Susan Capalbo</td>
<td>Senior Vice Provost, Faculty Affairs</td>
<td>Ph.D. Agricultural Economics, University of California-Davis</td>
<td>2016</td>
<td>leadership.oregonstate.edu/people/susan-capalbo</td>
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<tr>
<td>Jon Dolan</td>
<td>Vice Provost, Information and Technology (Interim)</td>
<td>M.S. Applied Information Systems, University of Oregon</td>
<td>2018</td>
<td>leadership.oregonstate.edu/people/jonathan-dolan</td>
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<tr>
<td>Philip Mote</td>
<td>Vice Provost and Dean, Graduate School</td>
<td>Ph.D. Atmospheric Sciences, University of Washington</td>
<td>2018</td>
<td>gradschool.oregonstate.edu/people/philip-mote</td>
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Administrative Groups

Three administrative groups (the University Cabinet, the Provost’s Senior Leadership Team and the Provost’s Council of Deans) ensure that institutional decision-making is both timely and effective. These groups and their responsibilities are described below.

The University Cabinet serves as President Ray’s core administrative team, with members serving at the invitation of the president.¹ The cabinet advises the president on matters related to university-wide initiatives and operations. The cabinet serves as a venue for shared strategic thinking and collaboration in support of the president’s agenda and initiatives. The cabinet also provides review of recommendations to the president on matters of broad institutional significance.

The Provost’s Senior Leadership Team consists of leaders charged with overseeing the administrative units and special initiatives supporting and advancing the academic goals of the university.²

The Provost’s Council of Deans serves as a venue for shared strategic thinking and collaboration on college and university-wide matters.³

Members of these three administrative groups manage the implementation of university-wide decisions and communicate these to their constituents. Members also seek agenda items and advice from constituents within their line of authority.

In addition to ensuring timely institutional decision-making processes, these groups encourage and support open communication and goal attainment. They also set the tone for cooperative working relationships that provide coordination within and among the university’s various organizational units. All of these activities support and advance OSU’s mission and accomplishment of core themes.

Qualified leadership oversees the academic programs housed within the university’s 11 academic colleges, the Honors College and the Graduate School. Each college has a dean responsible for all faculty, staff, students and academic programs in its area. Academic colleges are divided into departments or schools administered by a department head, chair and/or director, who is responsible for academic programs leading to degrees, certificates, options or minors requiring a specific group of courses for completion.

The institution employs a sufficient number of qualified administrators who provide effective leadership and management for the institution’s major support and operational functions. These groups are organized to work collaboratively across the institutional functions, and the units foster the fulfillment of OSU’s mission and core themes.
2.A.12 Policy and Procedures — Academics

Academic policies — including those related to teaching, service, scholarship, research, and artistic creation — are clearly communicated to students and faculty and to administrators and staff with responsibilities related to these areas.

The communication of academic policies at OSU occurs via several avenues and websites. The communication of these academic policies to faculty and staff begins with orientation of new employees to the university, and also within the orientation and trainings provided by respective departments and units.

Through the Office of Human Resources, all new Corvallis, Hatfield, Portland and Extension faculty and staff participate in a new employee orientation. The Office of Human Resources offers new employee orientation each month, and these sessions cover the organizational structure and mission of OSU, health and retirement benefits, campus resources and service, and terms and conditions of employment, including annual reviews. All new OSU-Cascades faculty and staff are offered a similar orientation and onboarding process at the Bend campus. Teaching, service, scholarship, research and artistic creation are broadly covered in the university-level orientation and more specifically covered in school, college or department level orientations. New tenure-track faculty are invited to an orientation session sponsored by Faculty Affairs in Corvallis and by the dean’s office at OSU-Cascades. This orientation is offered to help new tenure-track faculty to become familiar with promotion and tenure guidelines, as well as to introduce the key offices related to their assignments in teaching and research. The process for promotion and tenure is also provided online in the Promotion and Tenure Guidelines. Academic policies are also communicated via the Faculty Handbook, which includes all academic policy related to academic freedom, appointments, human resource policy, governance and faculty organization, curriculum policy, retirement and grievance procedures. Academic policies are also governed by university-wide rules and academic policies related to the appointment, evaluation, retention, promotion and termination. These policies reside within OSU Policy 580-021: Conditions of Service.

Academic policies are communicated to the students through the Academic Catalog. The annual registration guide, which is available through the registrar’s office, provides descriptions of all academic regulations. The registrar’s website provides information pertaining to academic policies including those related to student records, registration, grading and examinations, academic regulations, graduation and degree audits and student privacy rights. Working with the registrar’s office, academic advising offices
frequently send academic policy reminders to students, and the registrar’s office alerts students to policies at key junctures in their academic progress.

New first-year students experience an orientation called START, which provides an introduction to the campus along with academic policies. First-year, transfer and international students attend required new student orientations as well. These sessions occur throughout the year and cover numerous topics including academic policies. New transfer students experience an orientation called Transfer START, designed to provide a general orientation including academic support, services and academic policies. With respect to student research, the Graduate School provides orientation to all new graduate students as part of OSU Graduate Welcome Week. At OSU-Cascades, each graduate program conducts its own orientation. Workshops and seminars help new and current graduate students learn how to best prepare for a successful graduate school experience and make steady progress toward a degree. For online students, Ecampus provides distinct online orientations for degree-seeking undergraduate students, nondegree-seeking students and graduate students. It covers a variety of topics specific to online and hybrid learners, as well as a tutorial of the student services and resources available to Ecampus students.

Exhibits 2.A.12

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2.A.13 Library and Information Resources

Policies regarding access to and use of library and information resources — regardless of format, location, and delivery method — are documented, published and enforced.

Oregon State University Libraries and Press (OSULP) policies regarding access to and use of library and information resources are documented, published and enforced.

Library-specific policies are accessible via the OSU Academic Catalog and the libraries’ websites. Policies specific to locations other than the Valley Library on the Corvallis campus are accessible on the websites for these locations and linked from the OSU Libraries’ policy website.
These policies are also provided and included at all library locations including the Marilyn Potts Guin Library (Newport, Oregon), the McDowell Veterinary Medicine Library (Corvallis, Oregon), and the OSU-Cascades Library (Bend, Oregon). Library staff at public service desks will print copies of these policies for library users upon request at no charge.

Library policies are updated as needed and reviewed every two years. New university-level policies are vetted through the Executive Policy and Standards Committee. OSULP seeks legal advice from general counsel whenever necessary to develop or enforce policies.

OSULP relies on two primary means to enforce policies: an OSU Network ID (ONID) and/or an OSU or government-issued identification card. Access to electronic library resources from off campus requires authentication via a valid ONID account username and password. A valid OSU identification card or valid OSU Convenience Card (for unaffiliated or community users) is required to check out materials; community users also may obtain a computer use card to gain access to the Valley Library patron computers in the Learning Commons. The computer use card does not allow checkout of library materials.

Exhibits 2.A.13

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2.A.14 Transfer-of-Credit Policy

The institution develops, publishes widely, and follows an effective and clearly stated transfer-of-credit policy that maintains the integrity of its programs while facilitating efficient mobility of students between institutions in completing their educational programs.

Oregon State University develops, publishes widely and follows an effective and clearly stated transfer-of-credit policy that maintains the integrity of its programs, while facilitating efficient mobility of students between institutions in completing their educational programs. The transfer-of-credit policy for undergraduate students, Academic Regulation 2, is published in the academic catalog, Academic Regulations section.¹

OSU’s transfer credit policies and suite of credit transfer guides are available from the transfer admissions website.² This admission resource provides details about transferability for both in-state and out-of-state students along with transfer support services, degree partnership programs and transfer orientation. Academic colleges help to prepare and update advising guides available at the site above, which help students from Oregon community colleges and other schools understand transfer policies and how courses transfer into specific majors.³, ⁴ Ecampus provides information regarding transfer credit policies and processes for online students and offers unofficial transcript evaluation prior to admission to inform students of their admissibility to the institution.⁵ Additionally, OSU has been working with academic units to produce degree maps that outline the courses that a student ideally takes once at OSU to work toward a degree. These degree maps help transfer students understand the courses they should be taking if they do not plan to begin at OSU right away. OSU has active participation on statewide work groups related to transferability coordinated by the Higher Education Coordinating Commission (HECC). Academic units work with faculty at community colleges on creating transfer pathways and articulation of credits.
Exhibits 2.A.14

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<td>Ecampus Transfer Information [ecampus.oregonstate.edu/about/transfer-information.htm]</td>
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2.A.15 Students’ Rights and Responsibilities

Policies and procedures regarding students’ rights and responsibilities — including academic honesty, appeals, grievances, and accommodations for persons with disabilities — are clearly stated, readily available and administered in a fair and consistent manner.

At Oregon State University, the Office of Equal Opportunity and Access (EOA) \(^3\) is responsible for overseeing compliance with Title IX, civil rights, and affirmative action laws and regulations that include the Americans with Disabilities Act and Veterans Section 503, as well as OSU policies in the areas identified under supporting documents.

OSU implemented a Sexual Misconduct and Discrimination Policy \(^2\) along with an Investigation and Resolution Process \(^3\) for students that describe the complaint process, investigation process, administrative conference, appeal process and voluntary resolution process. It also explains additional provisions related to advisors, participation, privacy, witness cooperation, conflicts of interest and record keeping. The investigation and resolution process for students applies to students who are accused of, or are alleged victims of, violations of University Policy 05-001: Sexual Misconduct and Discrimination. \(^4\)

EOA responds to all verbal, written and electronic reports of alleged violations of the policy. EOA is committed to making the investigation and resolution process as accessible as possible for all students. Students residing off campus or who are otherwise unable to participate in person may request arrangements to participate in other ways (including by providing written statements, through telephonic or online means, etc.). Students with disabilities have the right to reasonable accommodation. Students who require a disability or religious accommodation, language support including translation services, or who may have other factors that could impact their ability to participate are assisted.

The Academic Catalog is readily available online and describes students’ rights, responsibilities, as well as procedural and resource information. OSU’s Academic Regulation 15, Academic Misconduct, \(^6\) and OSU’s Code of Student Conduct \(^7\) provide details about students’ rights and responsibilities. Student conduct expectations are described in the catalog and the code of conduct. Procedures for reporting a violation and the appeals process for students are provided on the Student Conduct and Community Standards website. \(^8\)

The Disability Access Services Handbook provides a variety of resources including policy and procedures regarding access and accommodation. \(^9\) The Office of Student Life also provides information to students regarding their rights and responsibilities, including student conduct and disabilities access services. \(^10\)

The Office of Advocacy assists students who pay OSU-Corvallis fees with issues related to code of
conduct violations, academic dishonesty accusations, grade appeals, graduate student issues, student accounts and financial aid, international student and equal opportunity and access.\textsuperscript{11} Along with the Office of Advocacy, the University Ombuds Office\textsuperscript{12} provides support and guidance for students who have potential grievances within the university. The University Ombuds Office promotes a civil and inclusive campus community by providing informal, impartial and confidential conflict management services to all members of the university community. Ombuds assist with individual concerns through service and education and help address group conflict and systemic concerns.

Every student is responsible for knowing the academic and student conduct policies and regulations, and for observing the procedures that govern their relations with OSU. Requests for deviations from academic regulations are made via the Office of the Registrar or the Graduate School, depending upon the request. There are processes for exception requests that are handled by Faculty Senate committees, which are complete with appeal processes. Specific academic petition processes exist for registration changes, incomplete grades, reinstatement regulations and graduation requirements.

Exhibits 2.A.15

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<td>University Ombuds Office</td>
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2.A.16 Admission/Placement/Continuation/Termination Policies

The institution adopts and adheres to admission and placement policies that guide the enrollment of students in courses and programs through an evaluation of prerequisite knowledge, skills and
abilities to assure a reasonable probability of student success at a level commensurate with the institution’s expectations. Its policy regarding continuation in and termination from its educational programs — including its appeals process and readmission policy — are clearly defined, widely published and administered in a fair and timely manner.

Undergraduate Admission Policies

Freshman Admission

When considering candidates for admission, the Office of Admissions employs a holistic model. One of the goals of the model is to admit students who are evaluated to be successful while also ensuring that OSU is fulfilling its commitment to access. In the review of applications, students are evaluated based on past academic performance, as well as non-cognitive skills and abilities as demonstrated through the Insight Résumé tool. In addition to evaluation of official high school transcripts and/or home-school coursework, OSU requires official ACT or SAT scores from applicants applying to begin at OSU in the year following high school graduation. Essay components of these exams are not required. Home-school applicants must provide two SAT subject test scores. Those students with more than 12 college credits will be considered based on their performance in these courses rather than SAT subject tests.

Freshman International Admission

When considering international candidates for admission, the Office of International Admissions employs a transparent model that limits barriers to international student access to OSU programs. International applicants are required to have a minimum 3.0 high school GPA, earned the equivalent of a high school diploma and minimum TOEFL 80 (minimum 16 subscores) or IELTS 6.5.

Transfer Student Admission

Students who have already graduated high school, and who have 24 transferable quarter hours (16 semesters) from one or more regionally accredited colleges or universities, are considered for admission under OSU’s transfer admissions requirements. Transfer applicants are considered for admission based on their performance in college-level work and coursework completed (see table below). Exceptions are considered for unique student circumstances, with an inclination toward admission for students whose most recent work shows an ability to meet the academic requirements at OSU.

Degree Partnership Program

The Degree Partnership Program (DPP) allows students who meet OSU admission requirements to be dual-enrolled at OSU and one of the 17 Oregon community colleges or three community colleges in the state of Hawaii. This program was established to aid students in access to courses and ease the transition process from the community college to OSU. This program allows students to combine coursework from the community college and OSU for financial aid purposes to reach full-time enrollment. OSU and the community colleges have established memorandums of understanding and financial aid consortium agreements that ease the processes between the schools. Working in conjunction with academic advisors at both the community colleges and OSU, the university has established many transfer guides to help students meet both their goals at the community college and attainment of a degree at OSU. At the end of each term, the community college transmits the students’ transcripts to OSU, and the academic record from the community college is added to the academic record at OSU. DPP students have access to OSU’s MyDegrees system, which allows students to track progress toward degree attainment at OSU while at the community college.
### Table 2.A.16

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<th>Transferable Credits Entering OSU</th>
<th>GPA</th>
<th>Writing</th>
<th>Math</th>
<th>English Language</th>
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<tr>
<td>1 to 23 quarter hours (1 to 15 semester hours)</td>
<td>2.25+ transfer GPA AND 3.0+ high school GPA</td>
<td><strong>Preferred</strong>, but not required</td>
<td><strong>College-level math preferred</strong>, but not required</td>
<td>TOEFL iBT 80 (minimum 16 subscores) or IELTS 6.5 or two English composition courses from a recognized college or university in the U.S. with grades C- or better or one English composition course with grades C- or better.</td>
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<tr>
<td>24 or more quarter hours (16 or more semester hours)</td>
<td>2.25 — 2.49 transfer GPA</td>
<td>College-level writing equivalent to WR 121 (English Composition) with C- or higher</td>
<td>College-level mathematics equivalent to MTH 111 (College Algebra) or MTH 105 (Contemporary Math) with C- or higher</td>
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<tr>
<td>24 or more quarter hours (16 or more semester hours)</td>
<td>2.50+ transfer GPA</td>
<td>College-level writing equivalent to WR 121 (English Composition) with C- or higher</td>
<td><strong>College-level math preferred</strong>, but not required</td>
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### Admission Appeals

Any applicant who is denied undergraduate admission to OSU for academic reasons may petition the Faculty Senate Undergraduate Admissions Committee (UAC) for reconsideration. Full details about admission appeals, also known as Extended Admissions, are published on the Office of Admissions website. Decisions on appeals will be determined by the UAC after review of academic experience, test scores, recommendations and other criteria. Each petition is assessed on an individual basis. Transfer students whose GPA is below 2.0 are not considered by the UAC. Students denied because of conduct reasons, including being ineligible to re-enroll at a previous institution, may submit their appeals directly to the Director of Admission.

Returning students who are eligible to return but have been absent from OSU for four or more terms must complete a re-admission application through the Office of the Registrar. Students in attendance are expected to maintain satisfactory academic standing requirements set out in Academic Regulation 22. Students who are separated from the university as a result of not maintaining satisfactory academic standing must follow the reinstatement requirements set out in this regulation. Petitions regarding this regulation can be made to the Faculty Senate Academic Standing Committee.

### Undergraduate Placement Policies

Mandatory placement exams are required for admitted students to ensure proper advising and course placement in math. Some academic units, including writing, offer credit by examination or placement examinations, which are not mandatory, but may benefit students who believe they have met the learning outcomes of entry-level coursework through other noncredit experiences.
Graduate Admissions

Graduate admissions involves a two-step process in which academic program faculty assess applicants for promise within their academic disciplines. As stated in the OSU catalog:

“Admission decisions are based on many factors, such as the quality of the applicant’s prior academic degree and record of accomplishment, statement of purpose, letters of recommendation from professors or others familiar with the applicant’s academic work, performance in aptitude and achievement tests, relevant work experience, preparation in the proposed field of study and the connection of the applicant’s academic goals with the faculty’s research interests.”

After initial review by faculty, Graduate School staff evaluate applicant dossiers to ensure that minimum admission standards set by the Graduate Council are met. If an applicant shows promise but does not meet minimum university graduate admission requirements, faculty from the proposed program can request a second review. Secondary reviews are conducted by the Faculty Senate Graduate Admissions Committee, composed of academic and professional faculty. This committee meets twice monthly during the academic year. The full charter and current membership of the committee can be found on the Faculty Senate website.12

Standardized test scores are one of many criteria considered in admissions decisions; however, they are not required by all programs. The Graduate School accepts Graduate Record Exam (GRE) scores, GMAT, and other standardized tests as recommended by each graduate program. International applicants choose from among several tests of English language to document their proficiency.

Professional Degree Program Admission

College of Pharmacy: Admission to the Doctor of Pharmacy (Pharm.D.) program is a competitive process managed by the College of Pharmacy using a national central application service, PharmCAS. A faculty admissions committee within the college oversees application of admission policies approved by college faculty and the admissions process.

The college defines and publishes the admissions process and a set of prerequisite coursework. Candidates commonly consult with advisors to determine prerequisite course equivalencies for work completed outside of OSU. Candidates who are projected to complete prerequisites prior to matriculation, and who meet baseline performance requirements, are invited to submit a supplemental application addressing their interest in pharmacy and the OSU program. Students who fail to meet baseline performance standards may appeal to the college admissions committee for continuing review of their candidacy.

Upon successful completion of all application requirements, each candidate’s qualifications are reviewed by members of the admissions committee and, if considered to be competitive, invited for an interview. The interview is focused on a holistic evaluation of the candidate and includes an additional writing sample, observed team interactions and focused discussions with several individual interviewers. All candidates must participate in an interview. If a candidate is unable to travel to Oregon, the director of student services and head advisor may authorize an interview using distance technology.

Highly qualified candidates may request consideration as an early decision by meeting a specific application deadline and committing to attend OSU, if accepted. Early decision candidates not selected initially are placed into the overall candidate pool. Admission is offered to qualified candidates on a rolling basis following evaluation of the candidate’s entire application, including the interview. Candidates who are clearly not competitive are notified early in the process; all other candidates are considered on their
merit in comparison to the overall cohort. A target entering class size is defined by faculty based on several criteria, including college resources, to provide an outstanding educational experience. However, the admissions committee may choose to admit fewer students if the strength of the cohort does not support the target class size. Candidates may appeal to the director of student services and head advisor for reconsideration of an admission decision. Each appeal is discussed by the admissions committee and a decision is made.

Carlson College of Veterinary Medicine: Applicants to the Doctor of Veterinary Medicine (DVM) program must complete and submit a Veterinary Medical College Application Service application as well as a college-specific supplemental application prior to the application deadline. Applicants must have three letters of recommendation, including at least one letter of recommendation from a veterinarian. Transcripts from all classes taken and GRE scores must also be submitted. The admissions selection process is a holistic system that strives to select applicants who: 1) have a high probability of successfully completing the professional program; 2) possess the qualities deemed valuable in a veterinarian; 3) have knowledge of the veterinary profession; and 4) contribute to the cultural, geographic, professional and economic diversity of the student body and the profession.

Exhibits 2.A.16

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2.A.17 Cocurricular Activities

The institution maintains and publishes policies that clearly state its relationship to cocurricular activities and the roles and responsibilities of students and the institution for those activities, including student publications and other student media, if offered.

Oregon State University maintains clear policies in relationship to cocurricular activities and the roles and responsibilities of students and the institution. The Associated Students of Oregon State University (ASOSU) and the Associated Students of Cascades Campus (ASCC) exist as organizations to promote academic excellence, encourage holistic development of students and enable students to assert interests as members of the university community.\(^1\) ASOSU and ASCC have a significant and meaningful role in the institutional governance of the university, with guiding objectives and guiding principles established for that involvement outlined in Oregon State University’s Shared Governance with the Associated Students of Oregon State University.\(^2\)

ASOSU works closely with the Office of Student Life, Office of General Counsel and the Office of the Vice Provost for Student Affairs.\(^3\), \(^4\) ASCC works closely with OSU-Cascades Office of Student Life, Office of Finance and Operations, and the Vice President for OSU-Cascades.

Student Media
Orange Media Network oversees a variety of student media channels, including KBVR FM, KBVR TV, the Barometer student newspaper, Prism Magazine, DAMchic and Beaver's Digest.\(^5\) Students have the opportunity to gain technical skills such as writing, editing, photography, graphic design and video production, while building transferable skills such as time management and leadership. Students have access to faculty and staff (and the Office of General Counsel) who guide them on policies related to legal and ethical issues. The preamble of the bylaws of Orange Media Network outline expectations of student editorial autonomy.\(^6\)

OSU-Cascades
The Office of Student Life at OSU-Cascades oversees all co-curricular activities at the OSU-Cascades campus.\(^7\) Because student fees are different at OSU-Cascades than in Corvallis, the services supported by student fees are also different. The Office of Student Life enhances the mission of OSU-Cascades by providing services, resources, activities and involvement opportunities to support the cocurricular experience of students at this campus location. The Associated Students of Cascades Campus (ASCC) is OSU-Cascades' student government.\(^8\) ASCC advocates for student initiatives, organizes activities, supports students through programs, and represents the student voice at OSU-Cascades. The ASCC constitution explains the relationship and expectations of this student government organization.\(^9\)

Exhibits 2.A.17

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2.A.18 Human Resources

The institution maintains and publishes its human resources policies and procedures and regularly reviews them to ensure they are consistent, fair, and equitably applied to its employees and students.

Human Resources policies and procedures uphold Oregon State University's land grant mission and core values of accountability, diversity, integrity, respect and social responsibility.\(^1\),\(^2\)

**Personnel Policies and Processes**

Personnel policies and procedures are published as part of the Finance and Administration's Administrative Policies and Procedures Manuals, chapter Human Resources (OHR).\(^3\),\(^4\) Other relevant human resources policies are published in other chapters of the Administrative Policies and Procedures Manuals, the University Policy and Standards Manual, Faculty Handbook,\(^5\) Office of Equal Opportunity and Access Policies\(^6\) and the OSU Search Advocate Program.\(^7\) Many human resources policies are contained in the collective bargaining agreement with SEIU and CGE.

**Periodic Review**

The Office of Human Resources periodically reviews its policies and evaluates university-wide policies. In 2017, the Office of Human Resources hosted work sessions with the Office of University Compliance, Office of Equal Opportunity and Access, Facilities Services-Environmental Health and Safety and others to move critical compliance training to an online trackable format.\(^8\) During 2018-19, the Office of Human Resources will continue to work with the Office of University Compliance to review, categorize and update the human resource policies into university standards, policies and unit rules.

**Recruitment**

The recruitment and selection process is committed to equal employment opportunities and affirmative action as documented by the Recruitment and Selection Policy\(^9\) and the Search Advocate Program,\(^7\) which trains search committee members to promote equity, validity and diversity on OSU searches.

**Nondiscrimination and Harassment**

Harassment and discrimination are unacceptable at OSU, as outlined in University Policy and Standards.\(^10\) Discrimination and harassment can impede an individual’s ability to participate fully in the educational process and to fully contribute to the mission of the institution. Acts of discrimination, harassment and
insensitivity hurt and degrade all members of the campus community whether victim, perpetrator or observer. Every member of the university community is responsible for creating and maintaining a climate free of discrimination and harassment. OSU aspires to create and maintain a positive atmosphere of nondiscrimination in every phase and activity of university operations.

**Office of Equal Opportunity and Access (EOA)**

The Office of Equal Opportunity and Access (EOA) is responsible for overseeing compliance with equal opportunity, civil rights, Title IX and affirmative action laws, regulations and policies. EOA safeguards a just and productive learning and working environment for students, faculty and staff – including coordinating the university’s Title IX, Americans with Disabilities Act and Section 504 activities. EOA not only responds to reports of harassment and discrimination, but proactively creates an equitable experience for the university community. EOA’s Annual Report 2016-17 provides an overview of its work.

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2.A.19 Work Conditions, Rights and Evaluation Policies

Employees are apprised of their conditions of employment, work assignments, rights and responsibilities, and criteria and procedures for evaluation, retention, promotion and termination.

The Office of Human Resources provides services that allow faculty and staff to engage fully, achieve their potential and have a greater sense of job satisfaction. The Office of Human Resources offers support related to careers and employment at the university including onboarding processes, appointments and renewals, classification and compensation, employment benefits, performance management, evaluation policy and procedures, recruitment and selection and work safety.

The Office of Human Resources publishes policies, procedures and manuals that further provide details of conditions of employment, work assignments and rights and responsibilities. The OSU-Cascades human resources team offers face-to-face services for faculty and staff including orientation, onboarding and coordination with central Office of Human Resources functions listed above.

Evaluations
Employee procedures for evaluation, retention, promotion and termination are detailed in agreements and university policy. The university policy and collective bargaining agreements mandate regular or annual appraisals for classified and professional faculty. In addition, the Promotion and Tenure Guidelines, found in the university’s Faculty Handbook, provide policy and procedures for faculty promotions. The Employee and Labor Relations team provides training to supervisors, managers and employees related to the performance evaluation process.

Exhibits 2.A.19

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2.A.20 Human Resources – Security and Confidentiality

The institution ensures the security and appropriate confidentiality of human resources records.

OSU ensures the security, confidentiality, availability and integrity of human resource records, including student, employee and financial records received by individuals, through the performance of their duties; adherence to university policy and processes; established data and security governance; use of effective annual audit processes; critical training, Bridge Learning Management System (LMS); and implementation of best practices in managing and monitoring data security through its information security program. The university’s general approach to information security is addressed in Standard 2.G.5.

Exhibits 2.A.20

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2.A.21 Institutional Integrity – Policies Related to Announcements, Statements, and Publications

The institution represents itself clearly, accurately and consistently through its announcements, statements and publications. It communicates its academic intentions, programs and services to students and to the public and demonstrates that its academic programs can be completed in a timely fashion. It regularly reviews its publications to assure integrity in all representations about its mission, programs and services.

The integrity of communication is defined by three primary features: 1) that information is shared with stakeholders in a transparent and accessible manner; 2) that the information shared is accurate and reflects changes that have occurred since the last posted version; and 3) that the message is consistent. The responsibility to ensure communication integrity falls to different units depending on the nature and purpose of the communication.
Organizational structure determines units and employees responsible for communication (described in the governance section, NWCCU Standards 2.A.1-3). Related to institutional integrity, each of the sections below highlights the different areas for communication and how OSU ensures clear, accurate and consistent communication.

**Internal Communications**

All faculty and staff, as well as students who subscribe, receive daily email communications about university-related events via the publication of OSU Today, which is also available on the web. OSU-Cascades faculty and staff also receive an employee newsletter that covers news, announcements and events that are specific to the Bend campus. Events also are promoted on the university online calendar. The events calendar provides a central hub for OSU-related activities that occur at OSU’s two campuses in Corvallis and Bend, as well as facilities around the state.

**External Communications**

News-related external communications are overseen by the Office of University Relations and Marketing (URM). URM oversees news and research communications, marketing, events, trademark licensing, video productions, printing, mailing, conference services and community relations. URM also sets and manages OSU’s branding guidelines. The office works with faculty, staff and students to develop and communicate news stories.

The Business Affairs Office provides Procurement and Contract Services (PaCS) and communicates with external vendors. The PaCS Manual provides details about purchasing and contracting ethics, authority and records, purchasing, contracting and construction.

**Communication about Academic Intention, Programs and Services to Students**

Communications about academic intention, programs and services to students are provided in the Academic Catalog, including individual program websites, and on the Student Services website. Updates to the catalog are performed by the Office of the Registrar. Updates to program websites are the responsibility of the individual program or unit but align with the academic catalog. Program website updates and email announcements are made as changes are formally approved by the university’s Curriculum Council, Faculty Senate, provost and the state Higher Education Coordinating Commission.

**Communication about Policy and Procedural Changes**

Communication about policy and procedural changes occur through the following:

- OSU email lists (referred to as Inform Lists) that target the entire university community or specific audiences, such as deans, department heads, associate deans, directors, staff and students. These lists are used frequently and in conjunction with website and social media communications.

- As mentioned in the Policies and Procedures section of this report, policies are provided on various websites. Regular reviews of policies and publications are as follows:
  
  - The Office of the Registrar updates the online catalog as course, program and policy proposals are approved by the Faculty Senate or other approval authorities. Each year, the Office of the Registrar contacts units to request updates. The current catalog is in an online format; prior years’ catalogs are available online in PDF formats.
  
  - The Office of Academic Programs and Assessment provides changes to curricular policies on its website as changes occur and reviews policies regularly.
Exhibits 2.A.21

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**2.A.22 Institutional Integrity — High Ethical Standards**

The institution advocates, subscribes to, and exemplifies high ethical standards in managing and operating the institution, including its dealings with the public, the commission and external organizations, and in the fair and equitable treatment of students, faculty, administrators, staff and other constituencies. It ensures complaints and grievances are addressed in a fair and timely manner.

Oregon State University is committed to conducting its affairs in ways that promote mutual trust and public confidence. OSU’s mission statement includes the articulation of the university’s core values of accountability, diversity, integrity, respect and social responsibility. OSU reinforces these values through the development and implementation of policies and standards, and through the promotion of ethical practices across all aspects of institutional management and operation.

The Board of Trustees adopted a University Code of Ethics in July 2014. All employees, officers, students and volunteers acting on behalf of Oregon State University have a responsibility to work toward the fulfillment of the university’s mission and conduct themselves ethically, with the highest integrity and in compliance with all applicable laws, regulations and policies.

OSU policies, standards, guidelines and trainings have been developed to set high ethical standards and uphold the principles set by Oregon Statutes and the Oregon Government Ethics Commission. These principles include:
RESOURCES AND CAPACITY

- Procurement and contracting processes designed to facilitate the highest level of compliance with applicable regulations; ensure a fair procurement process, including grievance procedures for vendors; and safeguard the university with respect to providing expedient, efficient and cost-effective procurement (See also, NWCCU Standard 2.A.23).

- Policies including University Fraud, Waste and Abuse Reporting; Property Management Responsibilities; and Acceptable Use of Computing Resources.

- Policies ensuring compliance with civil rights and affirmative action laws, regulations and OSU policies, including policies prohibiting discrimination and harassment, and sexual misconduct and discrimination.

- Trainings provided to employees in FERPA, ethical foundations, ethics, mandatory reporting of child abuse, protected leave and information security.

- A code of Student Conduct and Community Standards that defines expectations outlining student accountability in diverse learning environments, including online and off-campus settings.

- All OSU students and student organizations are expected to abide by expectations of responsible behavior as established under the student conduct code.

- Resource offices including the Office of General Counsel, Office of Human Resources, Office of Audit, Risk and Compliance, Office of Equal Opportunity and Access and Office of Research Integrity.

Grievance Procedures
Grievance procedures are well established for students, faculty and staff. The responsible unit works to address complaints and grievances in a fair and timely manner. Examples include:

- All members of the university community may raise concerns of discrimination, harassment, retaliation and bullying with the Office of Equal Opportunity and Access. The office provides an annual report to the president and the cabinet so that senior leadership can review trends, determine if needs are being met and take action as needed.

- Faculty grievance procedures are detailed in OSU Policy 576-050.

- The grievance process for SEIU classified employees is detailed in the SEIU collective bargaining agreement.

- The grievance process for CGE classified graduate student employees is detailed in the CGE collective bargaining agreement.

- The Graduate School provides a grievance policy that encompasses educational concerns of OSU graduate students.

- Incidents involving student misconduct can be reported to Student Conduct and Community Standards.

- The Office of Institutional Diversity coordinates the university’s Bias Response Team, which works to respond to bias incident reports that affect students, faculty and staff. The Bias Response Team refers reports that violate university policy to the appropriate university office for investigation and resolution.

- Anonymous reports relating to violations stated in the Code of Ethics can be made through the Accountability and Integrity Hotline. The Office of Audit, Risk and Compliance administers the
hotline and provides an annual summary of hotline complaints and complaints made directly to the office in an annual report to the Board of Trustees.

- Ecampus provides a complaint resolution process and participates in the State Authorization Reciprocity Agreement (SARA) through the Oregon Higher Education Coordinating Committee (HECC).26

- The University Ombuds Office promotes a civil and inclusive campus community by providing informal, impartial and confidential conflict management services to all members of the university community.27 The office annually shares themes with the president.

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RESOURCES AND CAPACITY

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2.A.23 Institutional Integrity – Conflicts of Interest

The institution adheres to a clearly defined policy that prohibits conflict of interest on the part of members of the governing board, administration, faculty and staff. Even when supported by or affiliated with social, political, corporate or religious organizations, the institution has education as its primary purpose and operates as an academic institution with appropriate autonomy. If it requires its constituencies to conform to specific codes of conduct or seeks to instill specific beliefs or world views, it gives clear prior notice of such codes and/or policies in its publications.

Oregon State University adheres to clearly defined conflict of interest policies that apply to all members of the institution, including the Board of Trustees. The board has adopted a trustee conflicts of interest and recusal policy, which guides individual trustee participation in a discussion and vote on a board action where there is a potential or actual conflict of interest.¹

The university has adopted an Employment and Supervision of Family Members (nepotism) policy.² This policy states that an employee of the university may not supervise, hire or appoint his or her family member or a family member of the employee’s supervisor. In addition, an employee may not supervise or participate in the processes of review and decision-making on matters concerning retention, promotion, salary, termination or discipline of the employee’s family members.

The Research Office (RO) has a comprehensive policy for identifying and managing financial conflicts of interest in research.³ This includes information about definitions and types of conflict, goals and expectations and details about the conflict of interest committee. The Research Conflict of Interest Committee (RCOI) is made up of faculty representing the diverse academic, research and scholarship disciplines, as well as administrative functions at the university.⁴ The committee serves in an advisory capacity to the RCOI Officer who is responsible for reviewing, identifying and managing potential

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conflicts of interest. The Office of Research Integrity provides conflict of interest training to positions that require this type of annual training.⁵

Procurement and Contract Services provides a conflict of interest policy under its section on ethics. This policy states that the procurement of goods and services at OSU must be free of the undue influence of outside interests. There may be situations in which financial or other personal considerations may compromise, or have the appearance of compromising, an employee’s professional judgment in the execution of any part of the procurement or contracting process. Any conflicts or potential conflicts of interest regarding the procurement or contracting process must be reported to PaCS before making the procurement or executing the contract.⁶

The Oregon Government Ethics Commission (OGEC) government ethics manual is a guide for public officials and discusses the ethics laws, including conflict of interest, that apply to all OSU employees.⁷

Exhibits 2.A.23

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2.A.24 Institutional Integrity – Intellectual Property

The institution maintains clearly defined policies with respect to ownership, copyright, control, compensation and revenue derived from the creation and production of intellectual property.

The Office for Commercialization and Corporate Development (OCCD) manages policies regarding intellectual property.¹,² The OCCD supports research development and commercialization of university intellectual property. Focusing on the protection and transfer of intellectual property through license, confidentiality and material transfer agreements, this office serves as a bridge between researchers and commercial entities.³ From Oregon-based startups to large international companies, the OCCD facilitates OSU research to impact the world.
Exhibits 2.A.24

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2.A.25 Institutional Integrity — Representation of Accreditation Status

The institution accurately represents its current accreditation status and avoids speculation on future accreditation actions or status. It uses the terms “accreditation” and “candidacy” (and related terms) only when such status is conferred by an accrediting agency recognized by the U.S. Department of Education.

Representation of Accreditation Status
OSU strives to accurately represent and describe its accreditation status. Statements made about accreditation avoid speculation on future accreditation actions or status. These statements can be located online in the following locations:

- The Office of the Provost lists public information about university accreditation and states, “Oregon State University has been continuously accredited since 1924 and is currently accredited by the Northwest Commission on Colleges and Universities (NWCCU), one of seven regional accrediting bodies recognized by the Council for Higher Education Accreditation.”

- The Office of the Provost also communicates public information regarding the institution’s accreditation cycle, including reporting timelines and accreditation reports. “OSU was last accredited in 2011 using the previous 10-year accreditation cycle. The comprehensive accreditation visit required that the institution develop a university self-evaluation report (referred to as the Self-Study) and organize supporting data for the site-visit evaluation team.”

- The Office of the Registrar accurately represents the institution’s current accreditation status with the NWCCU in the Academic Catalog. This section of the Academic Catalog states, “Oregon State University is accredited by the Northwest Commission on Colleges and Universities. The university is authorized to offer baccalaureate, master’s, doctorate, and first professional degrees, as well as undergraduate-, post baccalaureate-, and graduate-level certificates. The Northwest Commission on Colleges and Universities reaffirmed the accreditation of Oregon State University in Spring 2011. The next comprehensive evaluation is scheduled for 2019.”

- OSU’s Ecampus also provides public communication about the institution’s accreditation. The “About” section of Ecampus states, “Oregon State University is regionally accredited by the Northwest Commission on Colleges and Universities (NWCCU).”
• OSU-Cascades provides public communication about this institution’s accreditation. The “About” section in OSU-Cascades’ website states, “Oregon State University – Cascades is accredited by the Northwest Commission on Colleges and Universities (NWCCU), one of seven regional accrediting bodies recognized by the Council for Higher Education Accreditation.”

Exhibits 2.A.25

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<td>nwccu.org</td>
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<td>3</td>
<td>leadership.oregonstate.edu/provost/7-year-institutional-accreditation-cycle</td>
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<td>4</td>
<td>catalog.oregonstate.edu/general-information/accreditation</td>
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<td>5</td>
<td>ecampus.oregonstate.edu/about/accreditation.htm</td>
</tr>
<tr>
<td>6</td>
<td>osucascades.edu/about</td>
</tr>
</tbody>
</table>

2.A.26 Institutional Integrity — Integrity of Contracts for Products and Services

If the institution enters into contractual agreements with external entities for products or services performed on its behalf, the scope of work for those products or services — with clearly defined roles and responsibilities — is stipulated in a written and approved agreement that contains provisions to maintain the integrity of the institution. In such cases, the institution ensures the scope of the agreement is consistent with the mission and goals of the institution, adheres to institutional policies and procedures and complies with the Commission’s Standards for Accreditation.

Contractual Agreements

The Procurement, Contracts and Materials Management (PCMM) department oversees the procurement of goods and services, contracts, accounts payable, construction contracting and materials management.

The procurement unit within PCMM is responsible for the non-construction-related procurement of goods, services and personal/professional services. While PCMM directly manages the procurement processes and methods for procurements exceeding $25,000, the office also manages policies and procedures associated with purchases less than $25,000 that are delegated to departments and business centers, depending on the dollar amount of the purchase. PCMM also manages procurement-related contracts and the development of long-term and managed contracts used by various OSU colleges and departments. Many of these are identified on the Buy ORANGE site of the PCMM website. Several contracted items can be purchased through the eProcurement system identified as BennyBuy.

The Construction Contract Administration unit within PCMM manages all construction-related services. This includes, but is not limited to, the following types of services:
RESOURCES AND CAPACITY

- Abatement
- Architectural
- Construction, renovation, remodeling and repair
- Engineering
- Geotechnical
- Land surveys
- Moving services for departmental moves
- System furniture and installation

Contract Services manages a majority of nonprocurement-related contracts that do not fall within the purview of Construction Contract Administration, Real Property or the Research Office. While it does not include all types of contracts that Contracts Services reviews and develops, the following list represents a majority of contract types managed by Contract Services:

- Affiliation agreements
- Internship and exchange agreements
- Memorandums of understanding
- Testing agreements and other agreements where OSU provides a service

Contractual agreements for the procurement of goods, services and construction-related services are primarily managed within PCMM and stated in the PaCS manual. The procurement analysts and contract officers are required to exercise due diligence in the review and approval of any contract or agreement that falls within their purview. It is the procurement analysts’ and contract officers’ responsibility to ensure that the document is clear and understandable, the contract supports the mission of the university, the terms are permissible since OSU is a public entity with a governing board, and that the terms and conditions are as favorable as possible to OSU. In those instances of accepting other party’s contracts, this may require marginal or extensive editing of the contract terms. The procurement analysts and contract officers are not provided contract signature authority until they consistently demonstrate their use of sound contract drafting and editing skills, as well as a clear understanding of governing rules, policies and procedures, risk assessment and the ability to provide a clear explanation of business decisions needed by the principle investigator or other appropriate decision maker.

PCMM has several contract templates and standard terms and conditions related to the procurement of goods, services, technology and construction. These templates are a result of a collaborative effort with the Office of General Counsel, Risk Management and appropriate stakeholders.

Exhibits 2.A.26

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<tr>
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<td>2</td>
<td>Procurement Unit</td>
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<td>3</td>
<td>Construction Contract Administration</td>
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</table>
OSU Standards for Procurement, Personal or Professional Services and Capital Construction and Contracting

| 4 | OSU Standards for Procurement, Personal or Professional Services and Capital Construction and Contracting | policy.oregonstate.edu/UPSM/03-015_procurement_solicitations_contracts  
|   |   | policy.oregonstate.edu/UPSM/03-010_procurement_thresholds_methods |
| 5 | PCMM Buy Orange | fa.oregonstate.edu/pacs/procurement/buy-orange |
| 6 | eProcurement | pacs.oregonstate.edu/pacs/construction-contract-administration |
| 7 | PaCS Manual Section 400: Contracts | fa.oregonstate.edu/pacs-manual/400-contracts |
| 8 | PaCS Manual Section 303: Purchase Orders | fa.oregonstate.edu/pacs-manual/300-purchasing/303-purchase-orders |
| 9 | University Standard: 03-015 Procurement Solicitations and Contracts | policy.oregonstate.edu/UPSM/03-015_procurement_solicitations_contracts |

2.A.27 Academic Freedom and Responsibilities

The institution publishes and adheres to policies, approved by its governing board, regarding academic freedom and responsibility that protect its constituencies from inappropriate internal and external influences, pressures, and harassment.

OSU publishes and adheres to policies approved through the University Policy and Standards Manual Process by the Executive Policy and Standards Committee. The policy manual related to academic freedom states: “All teachers in department institutions are entitled to freedom in the classroom in discussing subjects, but they should be careful not to introduce into their teaching controversial matter that has no relation to the subject.” Also, as a matter of policy, the board neither attempts to control, sway nor limit the personal opinion or expression of that opinion of any person on the faculty or otherwise on the department’s payroll.

In addition to executive policy and standards, the OSU Faculty Handbook includes the following statement about academic freedom and responsibility.

**Statement on Academic Freedom**

The faculty and administration of Oregon State University jointly accept the responsibility for maintaining an atmosphere in which scholars may freely teach, conduct research, publish and engage in other scholarly activities. This responsibility includes maintaining the freedom for the examination of controversial issues throughout the university, including classroom discussion when such issues are germane to the subject matter of the course.

The university does not attempt to control the personal opinion, nor the public expression of that personal opinion, of any member of the faculty or staff of the institution. Indeed, the faculty and administration of OSU feel a responsibility to protect the right of each employee to express his or her personal opinion, but in doing so, employees have an obligation to avoid any action which purports to commit the institution to a position on any issue without appropriate approval.
**Statement of Faculty Responsibilities**

The faculty of Oregon State University recognizes and accepts the special responsibilities incumbent on each of its members.

As a scholar in an academic discipline, each faculty member is expected to:

- Seek and state the truth as he or she sees it.
- Develop and improve his or her scholarly competence.
- Exercise critical self-discipline and judgment in using, extending and transmitting knowledge to diverse audiences on and off campus.
- Contribute to the development of the discipline.
- Practice intellectual honesty.

As a teacher, each faculty member is expected to:

- Encourage free pursuit of learning and free inquiry in students.
- Exemplify high scholarly standards.
- Improve his or her instructional methods while ensuring that the primacy of the instructional function of the academic area is upheld.
- Respect students as individuals while adhering to the proper role as an intellectual guide.
- Foster honest academic conduct and fair evaluation of students.
- Protect the academic freedom of students and their rights of access to the university.

As a member of the university community, each faculty member is expected to:

- Respect and defend the right of free inquiry of fellow faculty members.
- Show due respect for the rights of others to hold and express their opinions.
- Accept a share of the governance tasks of the university.
- Be objective in the judgment of the professional capabilities and performance of colleagues.

Furthermore, the OSU Research Office makes the following statement about academic freedom:

**Academic Freedom Statement: Research at Oregon State University**

Oregon State University is proud of its reputation as an internationally recognized public research university. OSU’s mission as a land grant university to promote economic, social, cultural and environmental progress for the people of Oregon, the nation and the world is well-served by the university’s continued dedication to academic freedom for its faculty conducting research. As a 2006 joint statement issued by OSU’s provost and the Faculty Senate president provided: “The essence of academic life is to participate in the astonishingly complex search for truth. As such, the academy must be a place that encourages and celebrates innovative, exciting and unfettered research.” Accordingly, the decisions about what to research and what hypotheses to test rests primarily with the faculty member. OSU leadership does not determine what research faculty members engage in. Rather, university leadership works to create the necessary environment for open scientific inquiry. From time to time, OSU faculty members may research contradictory avenues or hypotheses, and their research may result in vastly different messages or conclusions from each other.
Exhibits 2.A.27

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<td>policy.oregonstate.edu/policy-standards-manual</td>
</tr>
<tr>
<td>3</td>
<td>policy.oregonstate.edu/policy/academic-freedom</td>
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</table>

2.A.28 Academic Freedom — Promotion of Freedom and Independent Thought

Within the context of its mission, core themes and values, the institution defines and actively promotes an environment that supports independent thought in the pursuit and dissemination of knowledge. It affirms the freedom of faculty, staff, administrators and students to share their scholarship and reasoned conclusions with others. While the institution and individuals within the institution may hold to a particular personal, social or religious philosophy, its constituencies are intellectually free to examine thought, reason, and perspectives of truth. Moreover, they allow others the freedom to do the same.

Oregon State University fosters an inclusive environment where everyone is provided an equal opportunity to succeed, learn, explore and engage in dialogue. Freedom of expression is essential to the university’s commitment to ensure inclusive educational opportunities and to support independent thought and to disseminate knowledge. At OSU, differences and dissenting viewpoints are not only tolerated but encouraged as part of the educational process. As a community, the university recognizes that from time to time, freedom of expression is a right that may raise strong emotional responses when put into practice. OSU’s freedom of expression statement promotes principles that provide a foundation for expression for faculty, staff and administrators.

Students

OSU’s Student Code of Conduct outlines student rights to free speech and assembly along with the responsibilities OSU students have when using these rights. OSU recognizes that student organizations create a compelling learning environment that prepares students to live and work in a multicultural society and global community. The university recognizes that all students should have access to form and join organizations of their own choosing to enhance the educational experience, support holistic personal development and promote retention. The parameters and policy that guide student organization creation and membership are outlined in the Student Organization Recognition Policy Manual. OSU’s student media group, Orange Media Network, also provides a space for the expectations of student editorial autonomy, which supports freedom of expression without fear of institutional reprisal or censorship.

The Graduate School and graduate student programs promote ethics in their research and work and support faculty in teaching graduate students how to conduct research in an ethical manner. The graduate student’s program of study, required by each potential graduate, has a section for the completion of
ethical research guidance requirements. This varies by discipline, but all graduate students are required to complete some activity that relates to this outcome. The Graduate School provides guidelines for faculty mentorship around the ethical conduct of research activities to assist in training.\textsuperscript{5}

Exhibits 2.A.28

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<tr>
<td>1</td>
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<td>Student Code of Conduct</td>
</tr>
<tr>
<td>3</td>
<td>Student Organization Recognition Policy Manual</td>
</tr>
<tr>
<td>4</td>
<td>Orange Media Network Bylaws</td>
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<tr>
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<td>Mentoring at Oregon State University</td>
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2.A.29 Academic Freedom — Objectivity of Scholarship

Individuals with teaching responsibilities present scholarship fairly, accurately and objectively. Derivative scholarship acknowledges the source of intellectual property, and personal views, beliefs and opinions are identified as such.

Teaching Responsibilities

The University Code of Ethics states all employees acting on behalf of OSU “have a responsibility to work toward the fulfillment of our mission and conduct themselves ethically, with the highest integrity, and in compliance with all applicable laws, regulations and policies,” \textsuperscript{1}

Individuals with teaching responsibilities are expected to present scholarship in an accurate and objective manner that acknowledges intellectual property and differentiates scholarship from personal beliefs. This expectation is stated in multiple ways, found in the Faculty Handbook\textsuperscript{2} and reflected in OSU’s Faculty Policies and Procedures Manual.\textsuperscript{3} The Statement on Academic Freedom sets the expected standards and states:

“The faculty and administration of Oregon State University jointly accept the responsibility for maintaining an atmosphere in which scholars may freely teach, conduct research, publish and engage in other scholarly activities. This responsibility includes maintaining the freedom for the examination of controversial issues throughout the university, including classroom discussion when such issues are germane to the subject matter of the course.

The university does not attempt to control the personal opinion, nor the public expression of that opinion, of any member of the faculty or staff of the institution. Indeed, the faculty and administration of Oregon State University feel a responsibility to protect the right of each employee to express his or her personal opinion, but in doing so, employees have an obligation to avoid any action which purports to commit the institution to a position on any issue without appropriate approval.”

The faculty of OSU recognizes and accepts the special responsibilities incumbent on each of its members. Faculty members with teaching responsibilities are also expected to develop and improve
scholarly competence, practice intellectual honesty, exemplify high scholarly standards and foster honest academic conduct.3

Faculty members are responsible not only for upholding their own behaviors around scholarly honesty, but also for the academic honesty of their students. Appendix A, Academic Honesty, of the Faculty Handbook provides information about academic integrity on campus, describes the procedures currently in use at OSU and addresses the questions: How is academic honesty defined? Who maintains academic standards? What is the policy at OSU? How are OSU students advised of expectations? What actions can faculty take? 4

**Derivative Scholarship**

The Research Office (RO) helps advance research efforts by facilitating the pursuit of discovery, scholarship and innovation while maintaining the highest professional and ethical standards.5 The Office of Research Integrity (ORI) ensures compliance with ethical and legal responsibilities in research involving animal care and use, biosafety, chemical safety, scientific diving and boating, radiation safety and conflicts of interest.6 ORI includes the Animal Care and Use Committee (IACUC), Institutional Review Board (IRB), Conflict of Interest (COI), Scientific Boating and Scientific Diving. The university, through its compliance committees and authorized officials, issues and promulgates policies and procedures to ensure the appropriate and responsible conduct of all applicable activities at OSU.

The Office of Sponsored Research and Award Administration administers the Responsible Conduct of Research (RCR) Program at OSU.7 The RCR program provides a basic education in the responsible conduct of research that is an introduction to understanding ethical issues that may be encountered during the research process. The program was designed to meet the requirements outlined in Section 7009 of the America COMPETES Act, which mandates training in the responsible conduct of research for all proposals submitted on or due after Jan. 4, 2010. This effort is undertaken in collaboration with the Office of Research Integrity and the Graduate School.

The OSU Libraries provide a guide to OSU’s data policies related to data stewardship and retention.8 The Research Data Services provides both a records retention policy9 and a general records retention schedule.10

**Exhibits 2.A.29**

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<td>Faculty Affairs, Academic Freedom and Faculty Appointments <a href="academicaffairs.oregonstate.edu/faculty-handbook/academic-freedom-and-faculty-appointments">academicaffairs.oregonstate.edu/faculty-handbook/academic-freedom-and-faculty-appointments</a></td>
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<td>Faculty Handbook, Appendix A <a href="academicaffairs.oregonstate.edu/faculty-handbook/appendix-academic-dishonesty">academicaffairs.oregonstate.edu/faculty-handbook/appendix-academic-dishonesty</a></td>
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RESOURCES AND CAPACITY

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<td>8</td>
<td>Library Research Data Services: Campus Services and Policies</td>
<td>guides.library.oregonstate.edu/research-data-services/campus-data-services</td>
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<td>9</td>
<td>Records Retention Policy</td>
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<td>10</td>
<td>General Records Retention Schedule</td>
<td>scarclibrary.oregonstate.edu/general-schedule.pdf</td>
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</table>

2.A.30 Finance – Financial Policies and Integrity

The institution has clearly defined policies, approved by its governing board, regarding oversight and management of financial resources, including financial planning, board approval and monitoring of operating and capital budgets, reserves, investments, fundraising, cash management, debt management and transfers and borrowings between funds.

The university has a number of policies, approved by the Board of Trustees, regarding the oversight and management of financial resources. An overview:

- Debt Policy\(^4\)
- Internal Bank Policy\(^2\)
- Liquidity Management Policy\(^3\)
- Public University Fund Investment Policy\(^4\)
- University Investment Policy\(^5\)
- Standards for Recognition of a Foundation and the relationship Between OSU and OSU Foundation, including guidance for all private gifts\(^6,7\) (further defined in OSU Finance and Administration Division rules\(^8\))

Under its bylaws, the OSU Board of Trustees is responsible for overseeing the university’s financial resources and other assets.\(^9\) The Finance and Administration Committee of the board provides oversight of the university's financial operations, physical plant, long-term economic health and allocation of resources by reviewing and making recommendations to the board on annual operating budgets, capital project budgets and financial policies, and by reviewing quarterly management and investment reports of the university.\(^10\) The board has delegated to the president the authority to conduct the general business affairs of the university, consistent with board policy and oversight. The vice president of finance and administration is also delegated responsibility for reviewing and ensuring compliance under specific board-approved policies. Within its policies, the board has established a number of financial metrics on which the university monitors and reports. These metrics are also projected in the board-endorsed 10-Year Business Forecast.\(^11\)
Exhibits 2.A.30

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2.B HUMAN RESOURCES

2.B.1 Qualified Personnel

The institution employs a sufficient number of qualified personnel to maintain its support and operations functions. Criteria, qualifications and procedures for selection of personnel are clearly and publicly stated. Job descriptions accurately reflect duties, responsibilities and authority of the position.
RESOURCES AND CAPACITY

To support Oregon State University’s mission, the university employs a workforce of more than 15,000 (See Table 2.B.1).

The Office of Human Resources’ Search Excellence program outlines and provides the employing department with policies, processes and tools for the recruitment process.¹ To promote equity, validity and diversity to searches, the Office of Faculty Affairs trains search committee members using the Search Advocate Program developed at OSU.²

The Office of Human Resources maintains position descriptions and manages the recruitment process for faculty and staff. Position descriptions include clearly delineated job duties and responsibilities. Position announcements are posted on the OSU online recruitment website and are accessible at any time. Job opportunities are also posted in relevant journals, newspapers, publications and websites. Postings include a position summary, duties, working conditions/work schedule, minimum/required qualifications, preferred (special) qualifications, scholarly outcomes for academic faculty positions, recruitment for the search, posting and closing date and any additional special instructions for applying for the position. The Office of Human Resources provides information to prospective employees, including application processes, how to create an employment profile and resources about frequently asked questions.³

Table 2.B.1: OSU Workforce

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<th>Full-Time</th>
<th>Part-Time</th>
<th>Total</th>
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<td>Faculty</td>
<td>3,895</td>
<td>1,029</td>
<td>4,924</td>
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<td>Tenured/Tenure-Track Faculty¹</td>
<td>1,056</td>
<td>54</td>
<td>1,110</td>
</tr>
<tr>
<td>Instructors/Fixed-Term Professors</td>
<td>494</td>
<td>362</td>
<td>856</td>
</tr>
<tr>
<td>Research Faculty²</td>
<td>567</td>
<td>177</td>
<td>744</td>
</tr>
<tr>
<td>Non-Tenured Extension Faculty³</td>
<td>57</td>
<td>6</td>
<td>63</td>
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<tr>
<td>Professional Faculty</td>
<td>1,716</td>
<td>380</td>
<td>2,096</td>
</tr>
<tr>
<td>Emeritus (Active)</td>
<td>5</td>
<td>50</td>
<td>55</td>
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<tr>
<td>Classified</td>
<td>1,397</td>
<td>244</td>
<td>1,641</td>
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<tr>
<td>Graduate Assistants</td>
<td>—</td>
<td>1,873</td>
<td>1,873</td>
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<tr>
<td>Student Employees</td>
<td>—</td>
<td>6,400</td>
<td>6,400</td>
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<tr>
<td>Temporary Staff</td>
<td>—</td>
<td>176</td>
<td>176</td>
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<tr>
<td><strong>Total</strong></td>
<td><strong>5,292</strong></td>
<td><strong>9,722</strong></td>
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Exhibits 2.B.1

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2.B.2 Administrators and Staff Evaluations

Administrators and staff are evaluated regularly with regard to performance of work duties and responsibilities.
Administrators, professional faculty and staff are evaluated regularly with regard to performance of work duties and responsibilities.

**Review of Administrators**

All administrators are evaluated regularly on their work performance and responsibilities based on the university’s guidelines. While all administrators receive annual feedback on their performance from their direct supervisor, there is a more comprehensive review for the vice presidents, vice provosts, deans, department heads/chairs and other major unit leaders that occur at intervals not to exceed five years. The first objective of the five-year comprehensive evaluation is to assess past performance of individuals in leading their academic units or divisions on factors such as:

- Achievement of unit’s strategic goals.
- Mentoring and development of faculty and staff.
- Developing relationships with appropriate external constituents to position the unit for success in external grants and contracts.
- Private philanthropy.
- Legislative funding priorities.

The second and related objective is to seek input to help those administrators to improve their performance and to help them succeed in the future.

Formal, comprehensive reviews provide opportunities for substantive input from:

- All faculty, staff and students within the unit.
- Groups inside and outside the university who are significantly affected by the administrator’s performance.
- Others in a position to observe and evaluate the incumbent’s performance effectively.

Continuation of the incumbent’s administrative appointment following the periodic performance evaluation requires a letter from the supervisor formalizing the action to continue the appointment. Should the supervisor wish to change any of the terms and conditions of the employee’s appointment, he or she is to contact the senior vice provost for faculty affairs prior to issuing a letter to continue the appointment (unless the employee “serves at the pleasure” of his or her supervisor).

The president has responsibility for the annual performance evaluation of direct reports. The president conducts a comprehensive evaluation of the provost and executive vice president, the vice president for finance and administration, the vice president for university relations and marketing, the vice president for research, the vice president and director of intercollegiate athletics, the vice president and chief diversity office, the general counsel, the executive director of equal opportunity and access and Title IX coordinator, the director of government relations, the university ombuds, the Board of Trustee secretary, the chief audit, risk and compliance executive, and the chief assistant to the president.

Deans and vice provosts are evaluated annually by the provost and executive vice president. The provost also conducts a more rigorous “360 degree” evaluation of deans and vice provosts every three to five years.
RESOURCES AND CAPACITY

Review of the President
The OSU Board of Trustees adopted a Presidential Assessment Policy in May 2015, which was subsequently amended in June 2017. The policy was developed based on the best practices for conducting a presidential assessment as recommended by the Association of Governing Boards of Universities and Colleges (AGB). The policy outlines guiding principles and the process for both annual and comprehensive performance assessments of the president. The assessment process is overseen by the board chair, who prepares a board chair report that must be presented and accepted by the Board of Trustees. The assessment includes development of a self-assessment report by the president; an opportunity to gather input from trustees, shared governance partners, key stakeholders and others; and establishment of annual performance goals for the president. Presidential appointment are for five years, with annual reviews and a comprehensive review before the end of the fourth year.

Review of Classified Staff
Classified staff are reviewed on an annual basis. Reviews are conducted using the online Performance Management System (EvalS), which allows the Office of Human Resources to monitor the evaluation process. Staff members and supervisors receive auto-generated emails from the EvalS system reminding them of due dates and to update progress towards goals. Within the system, employees establish goals at the beginning of the evaluation cycle and track their progress throughout the year. At the end of the evaluation period, employees submit their self-evaluations for their supervisor’s review. Once the self-evaluation is submitted, the supervisor then reviews, rates and comments on the staff member’s work. In the last step, employees then have an opportunity to review the supervisor’s submission and provide comment.

Exhibits 2.B.2

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2.B.3 Professional Growth and Development

The institution provides faculty, staff, administrators and other employees with appropriate opportunities and support for professional growth and development to enhance their effectiveness in fulfilling their roles, duties, and responsibilities.
OSU provides faculty, staff, administrators and other employees a variety of opportunities for professional growth and development to enhance their effectiveness in fulfilling roles, duties and responsibilities.

The Office of Human Resources (OHR) provides training opportunities, both for individual employees and academic and administrative units. A full catalog of OHR training workshops is located online.1,2 OHR provides training opportunities online through a set of classes called eLearning. The eLearning training provides opportunities for professional development in an online format where employees can learn at their own pace and place.3 The topics of OHR training, in general, cover scope and focus. For leadership training, the OHR offers the Journey into Leadership and the Leadership Development Project.4 For manager and supervisor learning opportunities, the OHR provides training in Basic Tools for Supervisor/Manager Success, the Manager’s Legal Toolkit, and other trainings about OSU’s land grant status; the mission, vision and values of the university; performance management; safety and on-the-job injury/illness prevention; personal and organizational effectiveness; and systems implementations.3 OHR also sponsors a two-day conference, OSU Training Days, for faculty and staff. This conference provides more than 80 brief trainings and informational sessions ranging from Use of Canvas Studio Sites and Preventing and Addressing Workplace Bullying to Fitness On The Go: Exercises to Fit into Your Busy Day.

In April 2018, the university launched a series of critical trainings required for faculty and staff.5 The first phase included online modules on ethics, mandatory reporting of child abuse, protected leave and information security. The second phase will include modules related to prevention of sexual harassment and misconduct, other forms of prohibited discrimination and the Americans with Disabilities Act.

The Office of Faculty Affairs also offers opportunities and support for professional growth and development throughout employees’ careers at OSU.6 Programs include leadership development opportunities such as peer mentoring and leadership academy workshops, as well as workshops on specific topics such as promotion and tenure. In addition, faculty are able to participate in the National Center for Faculty Development and Diversity Faculty Success Program.7 The Office of Faculty Affairs also offers the Professional Faculty/Instructor Professional Development Fund, which enables recipients to keep current in their professional field.

OSU provides numerous faculty development opportunities to support teaching excellence and learning innovation through the Center for Teaching and Learning (CTL),8 the Writing Intensive Curriculum Program (WIC),9 the Difference, Power and Discrimination Program (DPD),10 and Ecampus.11 CTL provides expertise and training in pedagogy and course design through individual consultation, faculty learning communities, workshops and seminars.4 Two hallmark programs provided by the CTL are Tuesday Teaching Talks and the Hybrid Course Initiative, which supports faculty with the effective integration of online learning into on-campus courses through faculty learning communities. The WIC Program supports and instructs faculty across the disciplines who are developing and teaching writing-intensive courses as part of OSU’s Baccalaureate Core requirements. Through faculty seminars, lunches, departmental consulting, review of course proposals, and the newsletter, Teaching with Writing, WIC promotes excellence in writing and fosters a culture of writing.12 The DPD Program works with faculty across all fields and disciplines at OSU to develop inclusive curricula that address institutionalized systems of power, privilege and inequity in the United States. It provides a summer course development academy, workshops and seminars.13

OSU-Cascades faculty have opportunities to take part in faculty development programs on the Corvallis campus, and many professional development opportunities are brought from Corvallis to OSU-Cascades. In addition, OSU-Cascades, through coordination in the dean’s office or the Teaching Excellence Committee, offers specific professional development workshops for full and fixed-term faculty. The
OSU-Cascades Staff Executive Committee holds an annual staff retreat and periodic staff development opportunities throughout the year. The OSU-Cascades Office of Human Resources helps to organize periodic training locally in Bend.

Ecampus provides faculty development through online and face-to-face training and workshops for design, development and delivery of online courses. Ecampus offers a robust faculty development program with face-to-face, synchronous online and asynchronous online offerings, and including both required and optional development opportunities. All faculty who are developing an online course for the first time participate in an intensive online workshop, which comprises approximately 25 hours of training. In addition, each faculty member partners with an instructional designer for course development and additional one-on-one training. Training opportunities are provided to instructional faculty of all ranks, including GTAs, and training is available for faculty on campus and remotely. Trainings cover many aspects of online education including course design and development, facilitation, accessibility, learner engagement and custom trainings developed for academic units by request. A total of 324 faculty completed Ecampus professional development opportunities and trainings in FY 2017-18. Ecampus also hosts an annual faculty development event, Faculty Forum, which is typically attended by 200 to 250 faculty, advisors and administrators. At this one-day conference, faculty and advisors share with colleagues about their innovative approaches to online education, lessons learned and best practices in online and hybrid education.

**Exhibits 2.B.3**

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2.B.4 Sufficient Number of Qualified Faculty

Consistent with its mission, core themes, programs, services, and characteristics, the institution employs appropriately qualified faculty sufficient in number to achieve its educational objectives, establish and oversee academic policies, and assure the integrity and continuity of its academic programs, wherever offered and however delivered.

Consistent with its mission and strategic plan, OSU employs appropriately qualified faculty sufficient in number to achieve multiple educational and strategic outcomes, oversee academic policies and assures the highest integrity and continuity of its academic programs.

Qualified Faculty

As shown in Table 2.B.1, the number of university faculty members has increased from 3,237 in 2011 to 4,680 in 2017. There are four types of faculty: professional, instructors (non-tenure track), professorial (tenure track), and research (non-tenure track), all of whom contribute to achieve OSU’s educational objectives. The distribution of faculty members across campus varies; with the majority of the professorial, instructional and research faculty residing in colleges. Professional faculty members reside in the colleges, as well as administrative and support units, providing key support across campus. Examples of professional faculty positions in colleges include academic advisors, department and school heads, program coordinators/managers/directors and executive assistants to the dean or chair. Examples of professional faculty positions in administrative and support units include medical professionals (nurses, physicians), program directors/managers/coordinators, deans and associate deans and research analysts. Academic appointment policies, guidelines and reference materials are available in the Faculty Handbook.¹

Sufficient Faculty to Achieve Educational Objectives

By employing, developing and retaining sufficient qualified faculty, OSU has maintained accreditation for many of its colleges and academic programs. In addition to the NWCCU university-wide accreditation, there are a number of specialized program accreditations² and professional accreditations³. There are several additional mechanisms used to determine whether faculty numbers are sufficient. These include, but are not limited to, the following:

Academic Program Reviews: OSU offers 257 undergraduate, graduate, certificate and first professional programs, each of which undergoes a rigorous academic program review or professional accreditation. Benchmarks spanning a 10-year period include annual program assessment reporting and formal feedback, site visit with external reviewers and third-year follow-up reports addressing recommendations in external and Faculty Senate reviewers’ reports. A program review thoroughly investigates and assesses the program, including its curricular structure, course offerings and frequency, graduation rates, number of faculty and students, and financial and physical resources. Looking at this information holistically and comparatively over time reveals information about the health and functionality of the program, including the adequacy of staffing. At the end of each review, key leadership in the department, school, college and university are presented with the findings. This reflection and feedback information stimulates resource conversations, especially in areas of student and faculty success and staffing needs. Additionally, the Office of Institutional Research provides key data in profile reports annually to the colleges.⁴ Units use these data each year in conjunction with annual assessment activities and reports. This process allows units to more closely monitor their operational status, including assessing sufficient numbers of qualified faculty to achieve educational objectives.
Baccalaureate Core (Bacc Core) Reviews: This category review process assesses enrollment numbers, enrollment by class standings and course distribution by instructor rank. Although not a direct indicator of faculty sufficient in number, these data can provide clues about how a unit or units are managing their Bacc Core courses and may, in concert with other data, demonstrate sufficiency. The provost maintains a pool of access funds to respond to unexpected growth in key courses across campus, particularly in the Bacc Core offerings.

Individual Feedback: Department chairs, deans, Faculty Senate leadership and other administrative leaders invite, listen to and value individual conversations, comments and input from faculty, staff and students about the health of a course, degree program or unit. This information can also be useful in determining whether faculty and staffing needs are adequate.

Exhibits 2.B.4

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2.B.5 Faculty Responsibilities and Workload

Faculty responsibilities and workloads are commensurate with the institution's expectations for teaching, service, scholarship, research and/or artistic creation.

Faculty responsibilities and workload expectations for teaching, service, scholarship, research and/or artistic creation are expressed in the Faculty Handbook, Guidelines for Faculty Promotion and Tenure, and the Guidelines for Position Descriptions. The promotion and tenure guidelines are aligned with responsibilities and workloads to ensure clarity in faculty expectations.

The Faculty Handbook describes the process for developing position descriptions for faculty members. These guidelines state a “minimum of 15 percent should be allocated to scholarly and creative activity for all professorial rank faculty (tenured/tenure track, Senior Research, Extension, Courtesy) except clinical professorial faculty.” Each professorial faculty member is expected to have a unique position description that defines expectations for the position in key dimensions: service, teaching and instruction; outreach and engagement; and research, scholarship and creative activity. While supervisors assign work, position descriptions are developed collaboratively between the unit chair or department head and a faculty member. These are expected to be reviewed at each performance evaluation and changes clearly documented. Position descriptions form the basis on which promotion and/or tenure decisions are made. The Promotion and Tenure Guidelines define the duties that are expected to lead to scholarship and creative outcomes as both peer validated and disseminated. The Promotion and Tenure Guidelines provide descriptions about the assigned duties of teaching, advising, research, extension, service,
scholarship and creative activity, and about policy in granting indefinite tenure.

The Academic Appointment Guidelines provide definitions and policy related to faculty appointments, including the institution's expectations. This guide provides descriptions and definitions of professorial rankings, teaching and teaching-related responsibilities, what constitutes scholarly accomplishments, details about faculty in administrative positions and contractual agreements about fixed-term faculty.

Exhibits 2.B.5

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2.B.6 Evaluation of Faculty

All faculty are evaluated in a regular, systematic, substantive and collegial manner at least once within every five-year period of service. The evaluation process specifies the timeline and criteria by which faculty are evaluated; utilizes multiple indices of effectiveness, each of which is directly related to the faculty member's roles and responsibilities, including evidence of teaching effectiveness for faculty with teaching responsibilities; contains a provision to address concerns that may emerge between regularly scheduled evaluations; and provides for administrative access to all primary evaluation data. Where areas for improvement are identified, the institution works with the faculty member to develop and implement a plan to address identified areas of concern.

Periodic Review of Faculty

All academic and professional faculty members with .50 FTE or higher are evaluated annually per the Guidelines for Periodic Review of Faculty. The procedure for the actual review is best developed by the individual school, college or division. All faculty with .50 FTE or more shall be reviewed as follows:

- Those on annual tenure shall be reviewed annually.
- Those on indefinite tenure shall be reviewed as follows:
  - Assistant and associate professors shall be reviewed annually during their second through fifth years in rank at OSU and during any period in which they are reviewed intensively for promotion in rank. Otherwise, they shall be reviewed at least once every three years.
  - Professors and tenured senior instructors shall be reviewed at least once every three years.
RESOURCES AND CAPACITY

- Those on fixed-term senior research, clinical or practice professorial appointments shall be reviewed as described for faculty with indefinite tenure.
- Other fixed-term faculty with professorial rank, nontenured instructors, senior instructor I, senior instructor II, faculty research assistants, senior faculty research assistants I, senior faculty research assistants II and research associates shall be reviewed annually during their first five years of service, during any period in which they are being reviewed intensively for promotion in rank and at least once every three years thereafter.
- Professional faculty shall be reviewed annually.
- Faculty on multiyear or extended fixed-term appointments shall be reviewed annually.

**Nature of Evaluation**

In each instance, the evaluation shall include a statement of current responsibilities of the faculty member, and signed comments on the faculty member’s progress in teaching, research or other scholarly pursuits; Extension; librarianship; and professionally related service and university service from those persons designated by the department, school or university to make the evaluations. The sources of information used as the basis for the evaluation should be included. Sources to be used are current and former students, other faculty from OSU or other universities, professional colleagues and, if appropriate, the public. In all instances, the evaluation shall be based only on material that is appropriate to the faculty member’s profession and the performance of faculty assignments.

The faculty member must be provided the opportunity for reading and initialing the evaluation and for furnishing written comments, explanations or a rebuttal to the evaluations to be placed in the faculty member’s personnel file. Disagreements on the contents of the file should be handled through normal university appeal procedures.

**Annual Performance Reviews**

Annual evaluations may include the following and provide opportunities for self-assessment:

- Key results for the past year.
- Key strengths in achieving those results.
- Key challenges and obstacles.
- A list of key goals/initiatives that are essential to address during the current academic year (these are the unit leader’s main focus areas) and a description of what would constitute success in each of the goals/initiatives.

The supervisor meets with each employee they directly manage to discuss the accomplishments for the previous academic year and the goals for the current academic year.

The supervisor writes a memo summarizing the annual review meeting. An original copy of the review goes to the unit leader, and a copy is placed in the personnel file of the employee that is maintained in the supervisor’s office.

**Mid-Term Tenure Review**

In addition to the annual Periodic Review of Faculty (PROF), all academic units conduct mid-term intensive reviews for faculty on annual tenure-track appointments. Mid-term reviews are supplemental to annual PROF evaluations and to a subsequent formal promotion and/or tenure evaluation. The mid-
term review provides opportunity for department heads, faculty members within a department, a dean and other supervisors to observe and comment on an individual faculty member’s performance relative to university and college promotion and tenure guidelines, and to offer appropriate advice on improving performance to meet promotion and tenure requirements. Mid-term reviews also provide a forum for the faculty member being reviewed to ask questions about the process and criteria for granting indefinite tenure or promotion. This policy does not alter the probationary status of a tenure track appointment and the university’s rights to issue a letter of timely notice under University Policy 580-021-0110.2

**Review for Promotion and/or Indefinite Tenure**

Faculty on annual tenure-track appointments are evaluated at the end of their sixth year of employment for promotion and/or the granting of indefinite tenure per OSU’s Guidelines for Promotion and Tenure.3 Evaluations of each candidate are based on reviewers’ recommendations on carefully prepared dossiers that document and evaluate the accomplishments of each candidate measured relative to their duties as enumerated in their position description. Additionally, faculty members up for promotion will be evaluated per the Criteria for Promotion.

**Evaluation of Teaching Effectiveness**

When teaching is part of the faculty assignment, effectiveness in teaching is an essential criterion for appointment or advancement. Faculty members with responsibilities in instruction can be promoted and tenured only when there is clear documentation of effective performance in their teaching role.

Faculty must demonstrate command of their subject matter, continuous growth in the subject field and the ability to organize material and convey it effectively to students. Other activities that provide evidence of a faculty member’s particular commitment to effective teaching include:

- Contribution in curricular development, including collaborative courses and programs.
- Innovation in teaching strategies, including the incorporation of new technologies and approaches to learning.
- Documented study of curricular and pedagogical issues and incorporation of this information into the classroom.

Evaluation of instruction is based on a combination of systematic and ongoing peer evaluations; following unit guidelines for peer review of teaching; tabulated responses from learners or participants of courses taught by the candidate; and evaluation, by student representatives, of materials that pertain to teaching.4,5 Peer evaluations should be based both on classroom observations and on review of course syllabi, texts, assigned reading, examinations and class materials. Where possible, evaluation is enhanced by evidence of student learning. When Extension education is part of a faculty member’s appointment, an equivalent tool to the Student Evaluation of Teaching (SET), the Citizen Evaluation of Teaching (CET), is used.

**Post-Tenure Review**

The university addresses faculty renewal, development and improvement by providing post-tenure reviews of its faculty. This process identifies and assists underachieving faculty in fulfilling the potential that was recognized upon their initial employment and reaffirmed upon the award of tenure. If the review process identifies areas in which a faculty member is not fulfilling the expectations of his or her position, a professional development plan will be drafted and implemented. Thus, the process provides effective evaluation, useful feedback, appropriate intervention and timely and affirmative assistance to ensure that every faculty member maintains a record of professional development and accomplishment during the various phases of his or her career.
Exhibits 2.B.6

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2.C EDUCATION RESOURCES

2.C.1 Academic Programs

The institution provides programs, wherever offered and however delivered, with appropriate content and rigor that are consistent with its mission; culminate in achievement of clearly identified student learning outcomes; and lead to collegiate-level degrees or certificates with designators consistent with program content in recognized fields of study.

Content, Rigor and Mission

Several processes maintain appropriate content and rigor of academic programs that are consistent with OSU’s mission and core values. Degree and certificate programs are developed by the faculty in the specialty area and reviewed by faculty and administrators both inside and outside the unit. This process ensures both appropriate content and academic rigor as well as a sound assessment of the resources needed to implement a new or revised program. The review process also ensures that a new or revised program will not adversely affect other units or degree programs within and even outside of OSU. Proposals for new degree and certificate programs are submitted using a Curriculum Proposal System (CPS). This system tracks the original proposal and subsequent changes, provides sections for liaison and reviewer comments, lists the proposal’s status in the review process and archives the final version of all proposals. New and revised academic degree programs use the Category I proposal process, which includes final review and approval at the state level.

The requirements for Category I curricular proposals are:

- The program must contain clear, measurable program-level student learning outcomes.
- All required courses comprising an academic degree program must be listed, and each course must have assessable student learning outcomes; course syllabi must have learning outcomes clearly articulated and at the appropriate level of pedagogy.
• Library and budget evaluations must be included.
• Proposals must be coordinated with relevant, impacted academic units (e.g., given prerequisites, student interest and potential enrollment and related academic topics).
• Budget for four years.

Category I proposals for new degree programs are reviewed by the Faculty Senate Budgets and Fiscal Planning Committee, Graduate Council (for graduate degree programs) and Curriculum Council. Category I proposals for new graduate degree programs also require an external review. The final internal review steps for Category I proposals include a review by the Faculty Senate Executive Committee and review and approval by the full Faculty Senate and the provost. Upon approval by the Faculty Senate, the proposal is submitted to the provost. Upon approval by the provost, the final review and approval steps include the OSU Board of Trustees, Statewide Provosts’ Council and the Higher Education Coordinating Commission.

**Student Learning Outcomes**
All academic degree programs must have a plan to assess student learning outcomes. Annually, each degree program submits an assessment report, which includes the results of the assessment process, curricular changes and changes to the assessment process.

**Degrees and Certificates**
OSU Academic Regulation 25 describes the institutional requirements for baccalaureate degrees, published in the online catalog and schedule of classes. An undergraduate student may be granted a baccalaureate degree with one or more majors.

The requirements for a baccalaureate degree are:
• A minimum of 180 earned credits, including 51 credits of general education courses that comprise the Baccalaureate Core.
• A minimum of 60 upper-division credits, exclusive of upper-division physical education activity courses.
• A minimum of 36 credits in each major, including at least 24 in upper-division courses.

All students receiving a Bachelor of Arts degree will have received broad preparation in the humanities, arts and social sciences and be proficient in a foreign language equivalent to that attained at the end of the second-year sequence with a grade of C- or better.

All students receiving a Bachelor of Science degree will have completed coursework that emphasizes scientific ways of knowing and quantitative approaches to understanding in the physical and social sciences, particularly for curricula in professional fields. Colleges offering both the B.A. and the B.S. will have specific requirements clearly distinguishing the two degrees in terms of content and intent.² The college requirements for the two degrees will place comparable demands upon the time and effort of students.

To earn an undergraduate baccalaureate degree, a minimum cumulative grade point average of 2.0 is required. For graduate degrees, a grade point average of 3.0 (a B average) is required, and a grade point average of 3.0 is required before the final oral or written exam may be undertaken. All master’s degree programs require a minimum of 45 graduate credits including thesis (6 to 12 credits), research in lieu of a thesis (3 to 6 credits), or an integrative capstone experience (3 to 6 credits). The doctor of philosophy degree is granted primarily for scholarly attainments. There is no rigid credit requirement; however, the equivalent of at least three years of full-time graduate work beyond the bachelor’s degree (at least 108
graduate credits) is required. A complete set of academic regulations in support of the baccalaureate
degree, graduate degree and student experience can be found online.³

**Recognized Field of Study and Degree Designators**

All OSU courses, degree programs and certificates have designators consistent with program content in
recognized fields of study and are mapped to the National Center for Education Statistics Classification of
Instructional Programs taxonomy.

**Professional Programs**

**College of Pharmacy:** The Doctor of Pharmacy (Pharm.D.) degree requirements are defined by college
faculty consistent with accreditation standard defined by the Accreditation Council for Pharmacy
Education (ACPE). Degree requirements, progression standards and academic policies and programmatic
learning outcomes are defined and published on the college website.⁴

**Carlson College of Veterinary Medicine:** The professional curriculum is a 4-year sequence of courses
completed at the Carlson College of Veterinary Medicine and the Oregon Humane Society. Program
outcomes and curriculum requirements align with the American Veterinary Medical Association
accreditation standards and can be found on the college website.⁵

Exhibits 2.C.1

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**2.C.2 Publication of Student Learning Outcomes**

The institution identifies and publishes expected course, program and degree learning outcomes.
Expected student learning outcomes for courses, wherever offered and however delivered, are
provided in written form to enrolled students.

All learning outcomes are identified through faculty-led shared governance processes. These processes
ensure program and degree learning outcomes are published, and course student learning outcomes are
provided to enrolled students.

Details about the publication of learning outcomes include:

- All courses have faculty-identified, measurable student learning outcomes.² To ensure this, all course
  proposals submitted through the Curriculum Proposal System (CPS)² for review and approval by the
  Faculty Senate must have syllabi that meet minimum syllabus requirements,³ including measurable
  learning outcomes.
• Each term a course is offered, it includes a syllabus that communicates learning outcomes to students. This requirement is articulated through the university’s shared governance expectations defined in the syllabus minimum requirements. The syllabus is made available to students at the start of the course.

• The faculty, through the Faculty Senate, has identified 14 different categories within the Baccalaureate Core. Each category has its own faculty-identified and measurable learning outcomes, criteria and rationale.

• The learning outcomes, criteria and rationale for every Baccalaureate Core category are published on the OSU website. Category-specific learning outcomes are required to appear, word for word, on the syllabus for every course that corresponds with a given Baccalaureate Core category.

• Faculty-identified learning outcomes are required for all undergraduate and graduate degrees and programs. Undergraduate programs submit annual assessment reports to the Office of Academic Programs and Assessment. This annual assessment report communicates learning outcomes, assessment methods and results, analysis and reflection, and data-derived curricular decisions. Graduate programs submit annual assessment reports, communicating learning outcomes to the Graduate School.

• Each program and academic unit is responsible for publishing all program learning outcomes on its public departmental or college website.

• The Academic Catalog displays all academic programs (degrees, certificates, options and minors) and course information. Each program, in turn, lists a summary of the program, majors and minors available, as well as statements about career opportunities and curriculum.

Exhibits 2.C.2

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<td>8</td>
<td>OSU Academic Catalog [catalog.oregonstate.edu]</td>
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2.C.3 Award of Credits and Degrees

Credit and degrees, wherever offered and however delivered, are based on documented student achievement and awarded in a manner consistent with institutional policies that reflect generally accepted learning outcomes, norms or equivalencies in higher education.

Academic Credit and Degrees
Academic credit is awarded in the form of quarter credit hours, as defined in Credits — Definitions and Guidelines. The same governs how academic credit is awarded for laboratory, studio and recitation components of a course. A concise definition of the credit hour is also provided in Academic Glossary/ Catalog Definitions. The grading system is defined in three different academic regulations (ARs): AR 17 lists and defines grades in the grading system, AR 18 describes the alternative grading system, and AR 19 describes the point system, including an example of how to perform the calculation.

Professional Degrees
College of Pharmacy: The Doctor of Pharmacy (Pharm.D.) degree requirements are defined by the faculty of the college consistent with accreditation standard defined by the Accreditation Council for Pharmacy Education (ACPE). Degree requirements, progression standards and academic policies and programmatic learning outcomes are defined and published on the college website. Accreditation is established through a rigorous self-study process followed by an onsite visit by ACPE and annual monitoring of key programmatic performance metrics.

Carlson College of Veterinary Medicine: The college follows the guidelines for academic credit as defined by OSU. The grading system for the professional program is pass/fail for all elective courses and a letter grade (A-F) for all required courses except the Veterinary Integrated Problem-Solving (VIPS) course, which is pass/fail.

Exhibits 2.C.3

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2.C.4 Degrees Have Coherent Design; Requirements Published
Degree programs, wherever offered and however delivered, demonstrate a coherent design with appropriate breadth, depth, sequencing of courses and synthesis of learning. Admission and graduation requirements are clearly defined and widely published.

Undergraduate Degree Programs
The first goal of SP3.0 is to provide a transformative educational experience for all learners. This includes specific strategies to make high-impact learning a hallmark of OSU undergraduate education, as well as to advance teaching and learning in the Baccalaureate Core (Bacc Core).
Undergraduate degrees have six requirements including the Bacc Core. This requirement includes writing, math, perspectives and difference, power and discrimination courses, with the goal of those program outcomes resulting in graduates who improve the citizenry. Additional requirements focus on total credit hours, upper-division credit requirements, satisfactory grade point averages and academic residence plans that ensure faculty feel confident that significant portions of graduates’ learning was experienced at OSU. Academic programs are required to participate in active program assessment on a regular cycle. These assessments are performed by internal colleagues and external peers to evaluate the breadth, depth, course sequencing and learning outcomes synthesis between the required course outcomes and the major outcomes.

The Faculty Senate Academic Regulations Committee, the full Faculty Senate and the Graduate Council (with the advice and support of the Graduate School) are responsible for recommending policy on the evaluation and acceptance of students for admission as well as the requirements for graduation. The Faculty Senate must approve any and all changes to the Academic Regulations (ARs) that are associated with admission and graduation requirements.

**Admission and Graduation Requirements – Defined and Published**

Clearly defined admission and graduation requirements are readily available via a range of sources, including the Academic Catalog; the university’s admissions website; college, school, department and program websites; and handbooks.\(^1\)\(^,\)\(^2\)\(^,\)\(^3\)

Graduation requirements are described in multiple ways:

- For baccalaureate degrees, the graduation requirements are published in the Academic Catalog and Schedule of Classes, and are also listed in the Academic Regulations, AR 25.\(^4\)
- Policies essential for planning and pursuing academic programs are published in the catalog.\(^5\)
- Academic Regulations 26 and 27 pertain to Concurrent and Subsequent Baccalaureate degrees.\(^1\)
- Colleges, schools, departments and programs publish additional graduation requirements on their own websites.
- OSU uses a degree audit tool, MyDegrees, to evaluate the completion of undergraduate and some graduate degrees. MyDegrees is a web-based degree checklist program and academic advising tool that assists students and advisors in reviewing degree progress. It organizes students’ academic transcripts chronologically and categorically, identifying courses they have completed and courses still needed to fulfill the degree requirements. College, school, department and program advisors review students’ records to verify the completion of Bacc Core, degree, minor, option and college requirements. The Office of the Registrar verifies completion of remaining institutional requirements.
- For graduate degrees, graduation requirements are published in the Academic Catalog, with additional detail and advice on procedures found in several sections of the Graduate School website.\(^6\) Policies governing master and doctoral degree programs’ graduation requirements are published in the catalog. If a program has additional or higher admission requirements, these are published on the program website and in programs’ graduate student handbooks.\(^7\)
Exhibits 2.C.4

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<td>cbee.oregonstate.edu/sites/cbee.oregonstate.edu/files/2018-19_enve_grad_handbook.pdf</td>
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**2.C.5 Faculty Role in Curriculum Design and Assessment**

Faculty, through well-defined structures and processes with clearly defined authority and responsibilities, exercise a major role in the design, approval, implementation and revision of the curriculum, and have an active role in the selection of new faculty. Faculty with teaching responsibilities take collective responsibility for fostering and assessing student achievement of clearly identified learning outcomes.

Faculty are involved at all levels in the design, approval, implementation and revision of the curriculum. The OSU Faculty Handbook cites Oregon Revised Statutes 352.146: “Responsibility for departmental and university curricula at Oregon State University rests with the faculty.”

**Faculty Role**

Curriculum proposals describing new academic degree programs, degree requirement changes and courses originate in academic units (college, school, department or program) through faculty-led curriculum committees and councils. Curriculum proposals are categorized as either a Category I proposal for new degrees and certificates, major revisions to existing degree programs or changes in delivery location, or as Category II proposals for new, change, drop course options and minors or changes to existing majors. All curriculum proposals must have faculty-identified, measurable learning outcomes, and Category I proposals must also include a curriculum four-year plan and an assessment plan aligned to program learning outcomes. Category I and 2 proposals have documented input from faculty liaisons that represent all interests in the degree programs and students taking the courses. Faculty liaison comments are addressed and recorded in the Curriculum Proposal System (CPS) prior to subsequent approval. Once approved at the academic unit level, the curriculum proposal is submitted to the college curriculum coordinator. The college curriculum coordinator collects input and suggestions from the college curriculum committee. Input and suggestions are sent back to the academic unit, where the unit’s curricular committee either makes or rebuts suggested changes. Once approval has been
achieved at the college level, the curriculum proposal is sent to the Office of Academic Programs and Assessment (APA) to facilitate a university-wide review through Faculty Senate committees and councils, including the Faculty Senate Curriculum Council for all curricular proposals, the Faculty Senate Graduate Council for graduate programs and courses and the Faculty Senate Executive Committee for Category I curricular proposals. All levels of the Faculty Senate review and approval process involve faculty input.

**Selection of New Faculty**

Faculty members take an active role in the recruitment and selection of new faculty who sustain the academic program, providing input on the strategic needs, desired qualifications and research expertise in the request for new faculty positions.

Requests for recruitment of new faculty are forwarded from units to the college leadership team for review and authorization. The position descriptions, once approved, are generated and advertised by faculty. Most academic colleges take advantage of the Search Advocate program, which trains and provides process advisors from outside the hiring unit to serve on search committees. The goal of the search advocate’s participation is to enhance equity, validity and diversity in the search and selection process. Faculty serve on the search committee, review applications, identify and interview qualified finalists, participate in campus visits for finalists and submit pros and cons of each candidate or recommend final selections to the chair or head of the academic unit and the dean of the college. All faculty have the opportunity to provide input by attending presentations given by finalists or open forums arranged to meet the finalists. Faculty members have the principal responsibility for identifying suitable candidates and making recommendations to leadership.

**Faculty Foster and Assess Student Learning**

As part of the annual assessment reporting and academic program review process, college, school, department and program units offering degrees use assessment data to guide them in the decision-making process for designing, approving, implementing and revising curriculum for their degree programs.

OSU’s culture for fostering and assessing student achievement of clearly identified student learning outcomes originate with faculty housed in the academic unit responsible for the program and curricular offerings. OSU’s assessment process employs a practical and systematic approach that strives for continuous improvement by: 1) conceptualizing learning outcomes; 2) planning an assessment process that aligns with learning outcomes and curricular activities; 3) evaluating assessment resources for assessment implementation; 4) implementing direct and indirect assessment activities; 5) collecting and analyzing assessment data; and 6) reflecting upon the analysis and feedback information to improve programs through data-informed decisions, while refining learning outcomes as needed. OSU’s assessment process is show in Figure 2.C.5.
Faculty with expertise in the subject develop and implement direct and indirect assessment methods at the course and program level. Assessment data are collected and analyzed by faculty, and this analysis is reflected on at curriculum committee meetings and full faculty meetings within the academic unit. Using data to inform curricular decisions, faculty facilitating the degree program recommend actions for revisions. Faculty report assessment and reflection activities in an annual program assessment report submitted to their college and the Office of Academic Programs and Assessment (APA) for undergraduate programs or the Graduate School for graduate programs. A standardized reporting template is used for both undergraduate and graduate programs. The leadership team of the college reviews the assessment reports and reflects on the data and analysis while providing feedback to the units. Additionally, assessment analysts and administrators with extensive assessment experience from the APA or Graduate School provide formal feedback to programs and the leadership team of their college about their assessment process. This is achieved using a standardized rubric meant to encourage reflection as well as improvements in the assessment process.

In addition to reporting annually on program assessment activities and data informed curricular decisions, programs also undergo comprehensive academic program reviews, which include the use of assessment data, analysis and reflection from the program’s assessment process. Furthermore, the general education component of OSU’s baccalaureate degree programs, composed of 51 required credit hours of the Baccalaureate Core, address outcomes from multiple perspectives (see Section 2.C.10). OSU faculty, through the Faculty Senate, have defined categories within the Bacc Core. Each Bacc Core category has its own measurable learning outcomes, criteria and rationale. The Bacc Core review process employs faculty-led, full-cycle assessment, with assessment data used to inform curricular decisions. Faculty at various levels use assessment data analysis and self-reflection to improve teaching practices and enhance student learning. Teaching faculty use the assessment process to make adjustments to courses and course curriculum. Faculty interpretations and reflections result in revisions to Bacc Core categories, student learning outcomes and criteria. See Appendix 2.C.5A for a summary of Undergraduate Academic...
Program Reviews and Appendix 2.C.5B for Graduate Academic Program Reviews.

Exhibits 2.C.5

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2.C.6 Library and Information Resources Integrated into Learning Process

Faculty with teaching responsibilities, in partnership with library and information resources personnel, ensure that the use of library and information resources is integrated into the learning process.
Details of Oregon State University Libraries and Press’ (OSULP) robust library instruction program demonstrate that teaching librarians and archivists collaborate with faculty to ensure that library and information resources are integrated into the learning process. These are also provided in the NWCCU Standard 2.E.3 section. OSULP teaching has begun to emphasize three essential literacies in support of student success in the classroom: information literacy, data literacy and primary source literacy. Librarians continue to provide standard overviews of library resources and tools, but with increasing frequency, OSULP faculty pursue opportunities that offer deeper collaboration with other OSU faculty. These deeper collaborations may include assisting with assignment design and assessment, providing scaffolded learning opportunities in multiple sessions and meeting one-on-one with students.

Library faculty also use the LibGuides platform to create, deliver and maintain research guides. Many of these guides emphasize important topical areas, such as academic integrity or identifying scholarly articles. However, there are also course-specific research guides. OSULP has supported OSU’s growth and commitment to delivering high-quality education online. OSULP collaborates with Ecampus to ensure equal access to the library resources that all students need regardless where they live.

Exhibits 2.C.6

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### 2.C.7 Credit for Prior Experiential Learning

Credit for prior experiential learning, if granted, is: a) guided by approved policies and procedures; b) awarded only at the undergraduate level to enrolled students; c) limited to a maximum of 25 percent of the credits needed for a degree; d) awarded only for documented student achievement equivalent to expected learning achievement for courses within the institution’s regular curricular offerings; and e) granted only upon the recommendation of appropriately qualified teaching faculty. Credit granted for prior experiential learning is so identified on students’ transcripts and may not duplicate other credit awarded to the student in fulfillment of degree requirements. The institution makes no assurances regarding the number of credits to be awarded prior to the completion of the institution’s review process.

Policies on Credit for Prior Learning (CPL) and Assessment-Based Learning (ABL) govern the conditions for accepting prior experiential learning. OSU awards credit for prior learning in areas where a student has demonstrated mastery of knowledge that corresponds directly with course content taught at the university. OSU recognizes numerous methods of demonstrating this knowledge, including Advanced Placement and International Baccalaureate exams, College Level Examination Program (CLEP) exams and credit for military education as recommended by the American Council on Education’s (ACE) Guide to the Evaluation of Educational Experiences in the Armed Services. Some academic programs offer credit by exam opportunities for students with unique backgrounds. OSU does not offer credit for portfolio or work experience.

CPL is subject to review at OSU and is neither guaranteed nor typically granted. Assessment Based Learning (ABL) credits are subject to review, but OSU has traditionally not granted credit earned through ABL, as credits awarded in this fashion do not typically conform with the academic standards of our...
coursework as established by teaching faculty. There are some exceptions based on unique programs where academic faculty review and accept credit in collaboration with partner institutions. These credits awarded follow the standard of being limited to a maximum of 25 percent of the credits needed for a degree and other requirements listed in the NWCCU standard.

Exhibits 2.C.7

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2.C.8 Transfer Credit

The final judgment in accepting transfer credit is the responsibility of the receiving institution. Transfer credit is accepted according to procedures, which provide adequate safeguards to ensure high academic quality, relevance to the students’ programs and integrity of the receiving institution’s degrees. In accepting transfer credit, the receiving institution ensures that the credit accepted is appropriate for its programs and comparable in nature, content, academic quality and level to credit it offers. Where patterns of student enrollment between institutions are identified, the institution develops articulation agreements between the institutions.

The Office of Admissions makes the initial decision about acceptability of transfer credits at the direction of academic units. When in question, the Office of Admissions refers course articulation to the appropriate academic unit for a decision. Working with faculty colleagues at feeder institutions, a college, school, department or program may submit new articulation decisions to the Office of Admissions where articulation records are updated. Transferability of courses is determined by trained evaluators. These evaluators use OSU articulation history and Transfer Equivalency System (TES) that provide documentation and course equivalency at the point of the application’s evaluation.

Several Academic Regulations exist related to the awarding of transfer credit. These include Academic Regulation 2, which states that up to 124 lower-division quarter credits will be accepted from a two-year college and that a maximum of 12 quarter credits of professional-technical course work will be accepted as part of the 124-credit total. Professional-technical credits are not normally accepted in transfer; they are articulated as NAT 000, which is noted as Not Accepted in Transfer. OSU’s Academic Regulation 3 states that credit from a non-regionally accredited institution may be accepted upon petition. Another regulation related to transferability is Academic Regulation 25 (Institutional Requirements for Baccalaureate Degrees), which provides two sections that identify how transfer credit is applied to the degree. OSU’s Academic Regulation 25 provides detail about academic residency and the number of OSU credits that must be applied to the degree versus the number of non-OSU/transfer courses. Additionally, Academic Regulation 25(h) provides a list of restrictions of coursework that may not be applied to the degree. Those restrictions include some types of transfer work, including professional programs such as law and veterinary medicine, and also courses such as physical education courses and music appreciation. These courses will have restrictions regardless of whether the coursework is institutional or transfer credit.
Per the Faculty Senate’s Curriculum Council, Executive Committee and the provost, articulation agreements are no longer approved. Instead, academic colleges maintain transfer advising guides specific to their academic programs. The guides provide prospective students details about how courses from key feeder colleges transfer to OSU and how those courses count toward OSU degrees in that academic college, as well as toward OSU’s Bacc Core requirements. Students transferring from other institutions may see if and how their credits transfer through OSU’s single course search tool.

After an advanced standing report has been completed and the student meets with an academic advisor, in certain cases it may be found that the initial equivalency decision made by the admissions office is not ideal. There is a transfer course equivalency petition, which the student can fill out and submit to the academic unit offering a similar course. The petition requires a syllabus and any other documentation that would be helpful in reviewing the petition. Once a decision is made, the academic unit forwards the petition to the Office of Admissions, where it is further reviewed. If no complications are found, the recommended approval or disapproval is processed, and the student and advisor are notified.

Graduate Transfer Credit
Oregon State University’s Faculty Senate Graduate Council sets overarching graduate transfer credit policies. After admission, students may submit transfer credit request forms to the Graduate School for review or may enter proposed transfer courses on a program of study document. Courses must meet Graduate Council standards as described in the Academic Catalog and be deemed relevant by the student’s graduate committee. An additional consideration when reviewing transfer credit requests is whether a student meets academic residency requirements for the level of graduate degree sought.

Transfer course requests initially rejected by Graduate School staff may be reviewed by the assistant or associate dean of the Graduate School upon request. The Graduate School dean is the final arbiter in determining transfer credit applicability.

Current graduate transfer credit policies can be found in the Graduate School Academic Catalog under “policies governing all graduate programs.”

Course-to-course articulation is not used at the graduate level.

Exhibits 2.C.8

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<td>Academic Regulation 25, Institutional Requirements for Baccalaureate Degrees <a href="catalog.oregonstate.edu/regulations">catalog.oregonstate.edu/regulations</a></td>
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<tr>
<td>4</td>
<td>Prospective Transfer Student, Understanding How Credits Transfer to OSU <a href="admissions.oregonstate.edu/prospective-transfer-student">admissions.oregonstate.edu/prospective-transfer-student</a></td>
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<td>5</td>
<td>Transfer Course Equivalency Petition <a href="admissions.oregonstate.edu/sites/admissions.oregonstate.edu/files/transfer_course_equivalency_petition.pdf">admissions.oregonstate.edu/sites/admissions.oregonstate.edu/files/transfer_course_equivalency_petition.pdf</a></td>
</tr>
</tbody>
</table>
2.C.9 General Education – Knowledge and Skills

The General Education component of undergraduate programs (if offered) demonstrates an integrated course of study that helps students develop the breadth and depth of intellect to become more effective learners and to prepare them for a productive life of work, citizenship and personal fulfillment. Baccalaureate degree programs and transfer associate degree programs include a recognizable core of general education that represents an integration of basic knowledge and methodology of the humanities and fine arts, mathematical and natural sciences, and social sciences. Applied undergraduate degree and certificate programs of thirty (30) semester credits or forty-five (45) quarter credits in length contain a recognizable core of related instruction or general education with identified outcomes in the areas of communication, computation and human relations that align with and support program goals or intended outcomes.

The Baccalaureate Core curriculum represents what the faculty believes is the foundation for students’ further understanding of the modern world. Informed by natural and social sciences, arts and humanities, the Bacc Core requires students to think critically and creatively and to synthesize ideas and information when evaluating major societal issues. The Bacc Core promotes understanding of interrelationships among disciplines to increase students’ capacities as ethical citizens of an ever-changing world.¹

The Bacc Core consists of five main categories: Skills, Perspectives, Difference, Power and Discrimination (DPD), Synthesis and a Writing-Intensive Course (WIC).

Table 2.C.9

<table>
<thead>
<tr>
<th>Group</th>
<th>Category</th>
<th>Required Credits</th>
</tr>
</thead>
<tbody>
<tr>
<td>Skills</td>
<td>Writing I</td>
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<tr>
<td>Skills</td>
<td>Writing II</td>
<td>3</td>
</tr>
<tr>
<td>Skills</td>
<td>Speech</td>
<td>3</td>
</tr>
<tr>
<td>Skills</td>
<td>Mathematics</td>
<td>3</td>
</tr>
<tr>
<td>Skills</td>
<td>Fitness</td>
<td>3</td>
</tr>
<tr>
<td>Perspectives</td>
<td>Biological and Physical Sciences</td>
<td>12</td>
</tr>
<tr>
<td>Perspectives</td>
<td>Western Culture</td>
<td>3</td>
</tr>
<tr>
<td>Perspectives</td>
<td>Cultural Diversity</td>
<td>3</td>
</tr>
<tr>
<td>Perspectives</td>
<td>Literature and the Arts</td>
<td>3</td>
</tr>
<tr>
<td>Perspectives</td>
<td>Social Processes and Institutions</td>
<td>3</td>
</tr>
<tr>
<td>Difference, Power and Discrimination (DPD)</td>
<td>Difference, Power and Discrimination (DPD)</td>
<td>3</td>
</tr>
<tr>
<td>Synthesis</td>
<td>Contemporary Global Issues</td>
<td>3</td>
</tr>
<tr>
<td>Synthesis</td>
<td>Science, Technology and Society</td>
<td>3</td>
</tr>
<tr>
<td>Writing Intensive Courses (WIC)</td>
<td>Writing Intensive Courses (WIC)</td>
<td>3</td>
</tr>
</tbody>
</table>
The course options in the skills category ensure students have the basic skills in written and oral communication and in mathematics that are critical to their academic and professional success. This category also includes fitness, with an emphasis on the value of personal wellness.

The course options in the perspectives category provide students with a breadth of knowledge across disciplinary fields. These fields range from biology (with laboratory requirements) to cultural diversity, to literature and the arts, physical science (with laboratory requirements), social processes and institutions, and western culture.

The course options in the DPD category allow students to examine the complex structures, systems and beliefs behind discrimination and unequal power distribution in American society.

The course options in the synthesis category use multidisciplinary approaches that develop critical thinking in a given content area. These content areas are contemporary global issues and science, technology and society.

The course options in the WIC category are taken within the students’ major. WIC promotes excellence in writing and fosters a culture of writing.

### Exhibits 2.C.9

<table>
<thead>
<tr>
<th>#</th>
<th>Baccalaureate Core Courses</th>
<th>Evidence Link</th>
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<td><a href="catalog.oregonstate.edu/earning-degrees/bcc">catalog.oregonstate.edu/earning-degrees/bcc</a></td>
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<td>2</td>
<td>Difference, Power and Discrimination (DPD) Program</td>
<td><a href="dpd.oregonstate.edu">dpd.oregonstate.edu</a></td>
</tr>
<tr>
<td>3</td>
<td>Writing Intensive Curriculum Program</td>
<td><a href="wic.oregonstate.edu">wic.oregonstate.edu</a></td>
</tr>
</tbody>
</table>

### 2.C.10 General Education Student Learning Outcomes

The institution demonstrates that the General Education components of its baccalaureate degree programs (if offered) and transfer associate degree programs (if offered) have identifiable and assessable learning outcomes that are stated in relation to the institution’s mission and learning outcomes for those programs.

#### Alignment of Learning Goals for Graduates and Bacc Core Outcomes

The design of the Bacc Core connects to Core Theme 1 (Undergraduate Education) and its mission for teaching and promoting economic, social, cultural and environmental progress. This connection is defined through alignment between the university’s Learning Goals for Graduates (LGGs) and the Bacc Core categories. This relationship is demonstrated in Table 2.C.10.

The general education component of OSU’s baccalaureate degree programs is composed of 51 required credit hours in the Bacc Core. No associate degree programs are offered. Courses within each Bacc Core category address outcomes from multiple perspectives and offer students variety in completing the Bacc Core requirements. There are hundreds of courses across the Bacc Core categories. This ensures an alignment with the interests of individual students. The Academic Catalog provides a list of the courses within each category, and the Bacc Core website provides examples of themed “playlists” that can show students how to use the Bacc Core to develop or enhance their interests in a particular program of study or an area of interest.
Bacc Core Learning Outcomes

The faculty, through the Faculty Senate, has identified different categories within the Bacc Core. Each Bacc Core category has its own faculty identified and measurable learning outcomes, criteria and rationale. All Bacc Core course proposals submitted through the Curriculum Proposal System (CPS) for review and approval by the Faculty Senate must have syllabi that meet minimum syllabus requirements, including Bacc Core-specific learning outcomes. The learning outcomes, criteria and rationale for every Bacc Core category are also published on the OSU website. Category specific learning outcomes are required to appear, word-for-word, on the syllabus for every course that corresponds with a given Bacc Core category. The syllabus is made available to students at the start of the course.

To ensure all courses within a Bacc Core category are addressing and assessing each required outcome, each course goes through two types of review processes: one for newly proposed Bacc Core courses and one for existing courses up for recertification as Bacc Core courses. The cycle follows this process:

- The first review is undertaken when the course is proposed through the CPS and gains approval as a Bacc Core course upon multiple faculty-led review and approval. All courses entering the CPS as a Bacc Core course proposal are sent to the Faculty Senate Bacc Core Committee for review and approval. The Faculty Senate Bacc Core Committee reviews syllabi and other information provided through the CPS to determine if the course will address and assess each of the required outcomes.

- The second review process takes place during the category review process every seven years, which includes assessment data.

Table 2.C.10

<table>
<thead>
<tr>
<th>Learning Goals for Graduates (LGGs)</th>
<th>Bacc Core Categories</th>
<th>Description</th>
</tr>
</thead>
</table>
| Competency and Knowledge in Multiple Fields | • Physical Sciences
• Biological Sciences
• Science, Technology and Society (STS)
• Contemporary Global Issues (CGI)
• Social Processes and Institutions
• Mathematics
• Western Culture
• Cultural Diversity
• Literature and the Arts | A broad baccalaureate education necessitates students encounter a variety of subjects, covering various disciplines and fields of study. These Bacc Core categories ensure that students are completing a wide range of coursework in multiple disciplines. |
| Critical Thinking | • Writing II
• Speech
• Mathematics
• Writing-Intensive Courses (WIC) | These four categories include learning outcomes that assess critical thinking. |
### RESOURCES AND CAPACITY

<table>
<thead>
<tr>
<th>Pluralism and Cultural Legacies</th>
<th>Western Culture</th>
<th>These categories ensure that students are viewing different perspectives of cultural legacies, both within the United States and throughout the world.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cultural Diversity</td>
<td>Cultural Diversity</td>
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<tr>
<td>Difference, Power and Discrimination (DPD)</td>
<td>Difference, Power and Discrimination</td>
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<tr>
<td>Literature and the Arts</td>
<td>Literature and the Arts</td>
<td></td>
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<tr>
<td>Contemporary Global Issues</td>
<td>Contemporary Global Issues</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Collaboration</th>
<th>Social Processes and Institutions</th>
<th>These categories ensure students are able to play an active role in a diverse, democratic society.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Social Processes and Institutions</td>
<td>Social Processes and Institutions</td>
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</tr>
<tr>
<td>Difference, Power and Discrimination</td>
<td>Difference, Power and Discrimination</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Social Responsibility and Sustainability</th>
<th>Contemporary Global Issues</th>
<th>These categories are limited to upper division courses to allow students to apply previously learned content to a broader world in a multi-disciplinary approach.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Science, Technology and Society</td>
<td>Science, Technology and Society</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Communication</th>
<th>Speech</th>
<th>These categories cover the breadth of written and spoken communication. Written communication is covered in a continuum of categories that begin in the lower division (WR I and WR II) and continue through the upper division of courses (CGI, STS and WIC)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Writing I</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Writing II</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contemporary Global Issues</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Science, Technology and Society</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Writing Intensive Course</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Self-Awareness and Lifelong Learning</th>
<th>Fitness</th>
<th>Lifelong learning and self-awareness are an integral part of a Baccalaureate education, and these categories include them as a learning outcome.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Difference, Power, and Discrimination</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contemporary Global Issues</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Science, Technology and Society</td>
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</tbody>
</table>

### Bacc Core Category Review and Assessment

To ensure that all existing courses within a given category are fulfilling the general education requirements, student learning outcomes are assessed by teaching faculty from each Bacc Core course. The assessments are reported to the Faculty Senate Baccalaureate Core Committee (BCC) during the Bacc Core category review process. A summary of the process:

- The goal of the review is to ensure alignment to the category-specific learning outcomes.
- Each year, two to three categories and one to three colleges' WIC courses are reviewed (about 50-150 courses per year). All categories are fully reviewed once in a seven-year cycle.
- The full review considers detailed course and category-level demographic data along with information submitted by instructors on a course review form.
- To prepare for the review, teaching faculty for each course collect assessment data during the academic year prior to the review.
• The BCC primarily uses information provided by faculty with teaching responsibilities. The only outside data reviewed by the committee is demographic data for each course:
  » Class schedule type (e.g. lab, recitation, lecture or online)
  » Campus location
  » Class standing (freshman, sophomore, etc.) of enrolled students
  » Primary college of enrolled students
  » Course grade distribution
  » Term(s) offered
• Teaching faculty for each course must complete a review form and provide syllabi for every version of the course, including online sections and sections taught at branch campuses. WIC courses must also submit assignment instructions, assignment summary charts and course schedules.
• On the submitted review form, instructors must describe how the Bacc Core Category Student Learning Outcomes are incorporated into the class and how the outcomes are assessed.
• The submitted form must describe how teaching faculty analyzes student learning data obtained from the course.
• Submitting faculty describe the process the unit uses to ensure consistency across different sections of the course.
• The submitted form also describes any proposed changes to the course based on assessment data and faculty analysis.
• Once a course has been reviewed by the Faculty Senate Baccalaureate Core Committee, the unit and faculty are informed about whether the course will remain in the Bacc Core.
• Courses that do not meet all of the criteria are reviewed more frequently and have opportunities to make corrections prior to losing their designation as a Bacc Core course.
• The Office of Academic Programs and Assessment (APA) and the Center for Teaching and Learning (CTL) offer support to faculty and units seeking to better align courses to the Bacc Core learning outcomes. WIC and DPD courses are also supported by offices specific to these categories.

**Review and Assessment Process**
The Bacc Core review process has demonstrated full-cycle assessment at both the course and university level, with assessment data used to inform curricular decisions. The process includes:
• Faculty at various levels use the collected data and self-reflection embedded in the process to make changes and adjust course outcomes and improve teaching practices.
• Teaching faculty use the process to make adjustments to courses and course curriculum.
• At the university level, faculty interpretation and reflection result in modifications to student learning outcomes and criteria.
Select Examples of Change from Review and Assessment

There are a number of examples of how the review and assessment process have led to changes and improvement in curriculum and courses. Selected examples of these assessment changes include:

- As a result of findings during the category review, several course changes were made to better align overall fitness education. Physical activity courses were more strictly aligned with the classroom portion of the course so students could directly apply the lessons being learned.

- Major changes to math courses were made to address large class sizes by adding prerequisites to allow for better foundational skills. Instruction and training of graduate teaching assistants was standardized to reduce multi-section variability within the same course. Standardized exam questions were embedded across all sections of the same course to better track student learning.

- WIC courses are required to have fewer than 30 students per section. The review process identified numerous WIC courses with an enrollment well over the limit. This required academic units (colleges, schools, departments and programs) to reallocate resources to better serve students.

- To better prepare for the review of courses in the Literature and the Arts category, the School of Literature, Writing and Film developed an organized approach that also applies to course proposals. This new system includes online resources for proposal originators and a matrix tool for identifying outcome assessment on course syllabi.

- Many cases of “drift” have been identified. “Drift” refers to courses that originate with a specific purpose and instructional method but move away from this method over time. For instance, the review of the Social Processes and Institutions category identified two courses that were being taught according to learning outcomes better aligned with the Contemporary Global Issues category.

Exhibits 2.C.10

<table>
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<td>2</td>
<td>main.oregonstate.edu/baccalaureate-core</td>
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<td>3</td>
<td>main.oregonstate.edu/baccalaureate-core/current-students/bacc-core-learning-outcomes-criteria-and-rationale</td>
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<td>5</td>
<td>apa.oregonstate.edu/assessment/bacc-core-review-proposal-templates</td>
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<tr>
<td>6</td>
<td>apa.oregonstate.edu/assessment/baccalaureate-core-category-review-schedule</td>
</tr>
</tbody>
</table>

2.C.11 Applied Degree or Certificate Programs

The related instruction components of applied degree and certificate programs (if offered) have identifiable and assessable learning outcomes that align with and support program goals or intended outcomes. Related instruction components may be embedded within program curricula or taught.
in blocks of specialized instruction, but each approach must have clearly identified content and be taught or monitored by teaching faculty who are appropriately qualified in those areas.

Oregon State University does not offer Associate of Arts (A.A.), Associate of Science (A.S.) or Associate of Applied Science (A.A.S.) degrees. OSU does not offer any Applied Baccalaureate or Bachelors of Applied Science degrees.

All undergraduate certificate programs\(^1\) at OSU are offered as a concurrent undergraduate program or as post-baccalaureate certificates.\(^2\) All undergraduate certificate programs have faculty-identified, measurable learning outcomes that align with their program goals and are assessed by teaching faculty affiliated with the named certificate program. Each program and academic unit is responsible for publishing all program learning outcomes on its public departmental or college website.

All programs submit annual assessment reports to the Office of Academic Programs and Assessment (APA).\(^3\) Content is taught or monitored within each program by appropriately qualified, OSU-based faculty.\(^4\)

Exhibits 2.C.11

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<td>Annual Assessment Reports</td>
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<tr>
<td>4</td>
<td>Faculty Handbook — Curriculum</td>
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</table>

2.C.12 Graduate Programs

Graduate programs are consistent with the institution's mission; are in keeping with the expectations of their respective disciplines and professions; and are described through nomenclature that is appropriate to the levels of graduate and professional degrees offered. They differ from undergraduate programs by requiring greater depth of study and increased demands on student intellectual or creative capacities; knowledge of the literature of the field; and ongoing student engagement in research, scholarship, creative expression, and/or appropriate high-level professional practice.

Graduate programs advance Oregon State University’s mission of teaching, research and outreach by supporting students in all aspects of their education. OSU offers 138 graduate degree programs in 11 colleges across two campuses with 23 programs online. Graduate assistants help fuel OSU’s $441 million research enterprise and help teach 26,239 undergraduate students. Graduates from research-based programs are employed in academia, industry, agencies and nongovernmental organizations in Oregon and around the world. In addition, there are professional programs that provide high-level training in disciplines designed to ensure a positive impact on the environment (e.g., Master of Natural Resources), the economy (e.g., Master of Business Administration) and health (e.g., Master of Public Health).
Graduate programs are in alignment with the expectations of their respective disciplines and professions. All new graduate programs undergo an external review by prominent members of comparable programs from the university’s aspirational peer institutions to ensure the program is aligned with the expectations of the profession. Reviews of existing programs are conducted every 10 years by a team that includes a prominent member of an aspirational peer institution, a potential employer of graduates and two senior OSU faculty to ensure programs continue to be relevant and in demand. Recommendations from these external reviews are addressed in an action plan, and the action plan is revisited three years after the review to ensure progress was made. Additionally, all programs are held accountable for ongoing and continuous improvement through an annual assessment process that addresses assessment plans authored by the program and integrates established program-specific and university-wide graduate learning outcomes, as well as meaningful metrics to assess strengths and areas for improvement.¹

Graduate programs are described through nomenclature that is appropriate to the levels of graduate and professional degrees offered. All new graduate programs are given a Classification of Instructional Program (CIP) code. In addition, all masters’ and doctoral programs that are research-based require a thesis or dissertation, respectively. OSU also offers professional, non-thesis master’s degrees that reflect the intent of professional degree programs and the growing demands of non-academic employers.

Graduate programs differ from undergraduate programs by requiring greater depth of study and increased demands on student intellectual or creative capacities; knowledge of the literature in the field; and ongoing engagement in research, scholarship, creative expression and/or appropriate high-level professional practice. All graduate students are required to meet established university graduate learning outcomes that reflect a high level of understanding and commitment to ethical standards and scholarly contributions in their respective professions.

University level graduate learning outcomes for Ph.D. degree programs state the student shall:

• Produce and defend an original significant contribution to knowledge.
• Demonstrate mastery of subject material.
• Be able to conduct scholarly activities in an ethical manner.

University-level graduate learning outcomes for master’s degree programs state the student shall:

• Conduct research or produce some other form of creative work.
• Demonstrate mastery of subject material.
• Be able to conduct scholarly or professional activities in an ethical manner.

Academic regulation ensures that more than 50 percent of courses used for a graduate program of study must be at the 500-level. Courses bearing dual-listed numbers (400/500) must provide students who are enrolled for 500-level credit with graduate-level learning.²

Expectations for learning outcomes in the graduate component of dual-listed (400/500 level) courses are the same as for stand-alone 500-level courses. Further, a distinction must be made between learning outcomes for students taking the course for undergraduate credit (400 level) and those taking the course for graduate credit (500 level). In most cases, this distinction should include emphasis on developing skills in analysis, synthesis and/or evaluation for the 500-level credit. The different student learning outcomes should be accompanied by appropriate differences in instructional opportunities and evaluation procedures.²
Exhibits 2.C.12

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<td>2</td>
<td>catalog.oregonstate.edu/college-departments/graduate-school/#text</td>
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2.C.13 Graduate Admission, Retention and Transfer Policies

Graduate admission and retention policies ensure that student qualifications and expectations are compatible with the institution’s mission and the program’s requirements. Transfer of credit is evaluated according to clearly defined policies by faculty with a major commitment to graduate education or by a representative body of faculty responsible for the degree program at the receiving institution.

Graduate admission and retention policies ensure that student qualifications and expectations are compatible with the institution’s mission and program’s requirements. Graduate admissions requirements include a 3.0 grade point average on a 4.0 scale following completion of an undergraduate or professional degree, three letters of recommendation, a statement of objectives and (for many programs) submission of standardized test scores. Individual programs may set higher standards, and most do to ensure consistency and competitiveness within their disciplines. Applicants not meeting minimum requirements may still be considered for admission, with the support of their academic program plus review and approval by the University Graduate Admissions Committee. International students must demonstrate an ability to communicate in the English language at a level that assures their ability to succeed in a graduate program. Individual admission requirements vary by country. Additional information regarding graduate admissions is also in Standard 2.D.4.

Retention and Leaves

Retention is a high priority for the Graduate School; the four-year graduation rate for master’s students is 84.3 percent, and the six-year doctoral graduation rate is 54.8 percent. Continuous enrollment of students is a requirement (though academic leaves can be granted), and all students are required to demonstrate satisfactory academic progress toward a degree.

In addition, the Graduate School has identified student success as a priority in its annual report (2016). OSU is devoting 1.5 FTE to identifying students who may be struggling academically and intervening with faculty and program directors to appropriately support students in achieving success and progress. The Graduate Student Success website assists new and continuing students with navigating the graduate academy.

Transfer Credit

Transfer of credit is evaluated according to clearly defined policies by faculty with a major commitment to graduate education or by a representative body of faculty responsible for the degree program and the receiving institution. OSU’s transfer credit policy is crafted by the Graduate Council of the Faculty Senate, as are all policies related to graduate curricula or programs. Transfer of graduate credits from other schools is based on official transcripts. Courses must be graduate level with letter grades of B- (2.70) or better. Graduate courses may be transferred if the transfer is approved by the student’s committee (for
degree-seeking students), by the major program or department and by the graduate school. Up to 15 graduate credits may be transferred toward a 45-credit master’s degree. Up to six graduate credits may be transferred toward an 18-credit graduate certificate. Graduate courses that may be transferred to a doctoral degree program can be courses that were used to satisfy the graduate course requirements for a graduate certificate or a master’s degree (or equivalent).

Exhibits 2.C.13

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<th>#</th>
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<tbody>
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<td>Country Requirements</td>
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<td>Academic Progress</td>
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<td>4</td>
<td>Graduate Student Success</td>
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<td>5</td>
<td>Graduate Council</td>
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</tbody>
</table>

2.C.14 Graduate Credit for Internships, Field Experience and Clinical Practice

Graduate credit may be granted for internships, field experiences and clinical practices that are an integral part of the graduate degree program. Credit toward graduate degrees may not be granted for experiential learning that occurred prior to matriculation into the graduate degree program. Unless the institution structures the graduate learning experience, monitors that learning and assesses learning achievements, graduate credit is not granted for learning experiences external to the students’ formal graduate programs.

Graduate credit may be granted for internships, field experiences and clinical practices that are an integral part of the graduate degree program. All courses of this nature are assigned a number and associated credit hours. These are typically blanket-numbered courses, which are given a title reflective of the work conducted (e.g., H510, Internship). Below is a list of title designations:

- **Research** (501 or 601) is for research that is not part of the thesis. Data obtained from such research should not be incorporated into the thesis.
- **Independent Study** (502 or 602).
- **Thesis** (503 or 603) covers the thesis research and writing. A student may register for thesis credit each term.
- **Writing and Conference** (504 or 604).
- **Reading and Conference** (505 or 605) and **Projects** (506 or 606) are used for special work not given under a formal course number.
- **Seminar** (507 or 607) is used both for departmental seminars and for special group work not given in a formal course.
- **Workshop** (508 or 608) is usually a special, short-term course covering a variety of topics.
• Practicum (509) is used for courses whose emphasis is the application of academic theory to the work environment.

• Internship/Work Experience (510 or 610).

All required courses of this type are included in a student’s program of study, which must be approved by the student’s graduate committee and by the Graduate School.

Credit toward graduate degrees may not be granted for experiential learning that occurred prior to matriculation into the graduate degree program. Unless the institution structures the graduate learning experience, monitors the learning and assesses learning achievements, graduate credit is not granted for learning experiences external to the students’ formal graduate programs. The university currently does not have a mechanism for students to receive credit for previous work other than through a transfer of credit. Transfer of credit policies are described in more detail in sections 2.A.14 and 2.C.8.

Exhibits 2.C.14

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<th>#</th>
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</thead>
<tbody>
<tr>
<td>1</td>
<td>Policy on Graduate Credit</td>
</tr>
</tbody>
</table>

2.C.15 Graduate Programs Prepare Students for Research, Professional Practice and Creative Work

Graduate programs intended to prepare students for research, professional practice, scholarship or artistic creation are characterized by a high level of expertise, originality and critical analysis. Programs intended to prepare students for artistic creation are directed toward developing personal expressions of original concepts, interpretations, imagination, thoughts or feelings. Graduate programs intended to prepare students for research or scholarship are directed toward advancing the frontiers of knowledge by constructing and/or revising theories and creating or applying knowledge. Graduate programs intended to prepare students for professional practice are directed toward developing high levels of knowledge and performance skills directly related to effective practice within the profession.

Programs to Prepare Students for Research or Scholarship

The doctor of philosophy (Ph.D.) and the doctor of education (Ed.D.) degree programs, as well as many master of science and master of arts programs, prepare students for research and scholarship for advancing the frontiers of new knowledge in various disciplines, including agriculture, mathematics, physical and life sciences, public health, engineering and social sciences, to name a few. Programs that prepare students for research and scholarship require a thesis (master’s level) or dissertation (doctoral level). To support students’ thesis work, the Graduate School, Student Affairs and the academic colleges provide professional development opportunities, including writing mentorship, workshops through the Graduate Writing Center, training for conducting responsible research and statistical consulting in partnership with the statistics department.

Programs to Prepare Students for Professional Practice

Professional practice programs help students to develop knowledge and apply skills directly related to effective practice within a given profession. Professional degrees such as the Master of Business
Administration (MBA), the Professional Science Master’s degree (PSM), the Master of Public Health (MPH), those associated with engineering (MEng), pharmacy (Pharm.D.), and veterinary science (DVM) prepare students to become effective professionals in their respective fields. For example:

- The Master of Public Health (MPH) program in the College of Public Health and Human Sciences prepares students for public health practice in six distinct options: biostatistics, environmental and occupational health, epidemiology, global health, health management and policy, and health promotion and health behavior. All MPH programs include novel and integrated coursework and opportunities for experiential work all over the globe.

- The Carlson College of Veterinary Medicine’s Doctor of Veterinary Medicine (DVM) emphasizes the importance of core training in comparative biology and medicine with opportunities for elective training across a wide variety of more specialized subjects such as wildlife medicine, marine science and clinical nutrition. The four-year sequence of courses addresses nine key learning outcomes informed by the American Veterinary Medical Association’s Council of Education. In addition to the preparation of clinically and professionally skilled veterinarians, the college is home to the Oregon Veterinary Diagnostic Lab and the Lois Bates Acheson Veterinary Hospital.

**Programs to Prepare Students for Artistic Creation**

A number of master’s programs are designed to prepare students for artistic creation, such as the Master of Fine Arts (MFA) in creative writing. Creative writing has a long tradition of excellence in producing and teaching creative writing and has a nationally competitive pool of applicants in fiction, poetry and creative nonfiction. The program also offers internships in literary editing, publishing, arts administration and alternative pedagogies (e.g., teaching in youth correctional facilities).

**Interdisciplinary Programs**

OSU offers interdisciplinary graduate programs addressing a range of academic interests and leveraging the institution’s various areas of expertise. Among these interdisciplinary programs are Comparative Health Sciences, Environmental Sciences, Marine Resource Management, Water Resources Science, and the Master of Arts in Interdisciplinary Studies. These programs provide comprehensive education and training, encouraging a multi-disciplinary approach to solving problems.

**Disciplinary Requirements and Student Learning Outcomes**

In addition to the university graduate learning outcomes required of all graduate students prior to certification of their degree (see section 2.C.12), each graduate program establishes program-specific learning outcomes that address the disciplinary requirements for the degree. Program staff communicate these program-specific learning outcomes with students at the outset of their matriculation.

The student’s knowledge of the discipline is evaluated at various stages during the academic journey. At a minimum, doctoral students must successfully complete an oral preliminary examination and a final oral examination/defense at the completion of the graduate course requirements. All students pursuing master’s degrees, with the exception of those listed below, must also complete a final oral examination.

- Master of Education (Ed.M.) students who complete the non-thesis option must take a final written examination.

- MBA students submit capstone projects that are assessed at the curricular core and graduate option levels, in addition to being assessed upon their fulfillment of graduate learning outcomes.
• Master of Counseling (M.Coun.) students admitted to the degree program prior to June 2017 must successfully pass a written project portfolio that demonstrates mastery of the M.Coun. learning outcomes.

• M.Coun. students admitted to the program beginning in June 2017 must successfully pass a nationally administered exam determined by program faculty.

Some academic units also require students to pass a written exam prior to the oral exam. The final oral examination for master’s candidates may, at the discretion of the graduate program, consist of a public thesis defense followed by a closed session of the examining committee with the candidate. Under normal circumstances, the final oral examination is scheduled for two hours. For master’s candidates whose programs require a thesis, not more than half of the examination period should be devoted to the presentation and defense of the thesis; the remaining time can be spent on questions relating to the student’s knowledge of the major field and minor field if a minor is included in the program of study. When no thesis is involved, not more than half of the examination period should be devoted to the presentation of the research project; the remaining time can be spent on questions relating to the student’s knowledge of the major field and minor field if one is included in the program.

Evidence of the effectiveness of this approach can be seen through more than 50,000 downloads of theses and dissertations per month from ScholarsArchive@OSU, as well as placement of students in professional positions around the world.

The Graduate School supports students on their own personal education journey and provides tools and support through student success programs and resources.1

Exhibits 2.C.15

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<thead>
<tr>
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<tbody>
<tr>
<td>1</td>
<td>gradschool.oregonstate.edu/graduate-student-success</td>
</tr>
</tbody>
</table>

2.C.16 Continuing Education and Noncredit Programs

Credit and noncredit continuing education programs and other special programs are compatible with the institution’s mission and goals.

Oregon State University offers a multitude of noncredit programs and courses to support the mission and goals of the institution.1

Among them are English-language programs for international students seeking to either learn English for professional and personal success or transition to a credit academic program at the institution. OSU manages these programs in partnership with INTO University Partnerships, an international company that assists with recruitment and placement of qualified students into the programs. Additionally, OSU offers all students the opportunity to participate in noncredit coursework. This experience allows students the opportunity to engage in innovative noncredit academic experiences, and students can earn recognition for a multitude of experiences related to core competencies the institution values. These competencies are education abroad, internships, service learning, undergraduate research, leadership and capstone experiences for academic programs.
The Professional and Continuing Education unit (PACE) supports the institution’s land grant mission by providing access to high-quality learning experiences. The mission of PACE is to “provide service and leadership to connect learners and partners to educational opportunities across Oregon and beyond.”

Through these continuing education programs, PACE aims to improve a learner’s performance, personal development and quality of life with high-caliber learning resources and programs. Through a wide breadth of noncredit courses, programs, trainings and workshops, PACE contributes to supporting the economic, social, cultural and environmental progress for the people of Oregon, the nation and the world. PACE provides more than 200 professional online course and certificate programs for approximately 12,000 students annually.

In addition to PACE, the College of Agricultural Sciences, College of Education, College of Engineering, College of Forestry and College of Pharmacy offer continuing education courses.

The OSU Extension Service, within the Division of Outreach and Engagement, provides information and expertise to help meet local challenges and help every Oregonian thrive. Extension Service programs include agriculture and natural resources, 4-H youth development, family and community health, forestry and natural resources, OSU Open Campus and Outdoor School. OSU Extension reaches all 36 Oregon counties, where faculty partner with local stakeholders to establish needs and design appropriate learning programs. Faculty members also use demographic and economic data to identify community needs and opportunities for significant social, environmental and economic impacts. Throughout the needs assessment process, program priorities are evaluated and aligned with Outreach and Engagement’s Strategic Plan and OSU’s mission and goals.

Exhibits 2.C.16

<table>
<thead>
<tr>
<th>#</th>
<th>Evidence Link</th>
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<tbody>
<tr>
<td>1</td>
<td>registrar.oregonstate.edu/non-credit-courses</td>
</tr>
<tr>
<td>2</td>
<td>pace.oregonstate.edu/about-us</td>
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<tr>
<td>3</td>
<td>pace.oregonstate.edu/catalog</td>
</tr>
<tr>
<td>4</td>
<td>pace.oregonstate.edu/certificate-programs</td>
</tr>
<tr>
<td>5</td>
<td>extension.oregonstate.edu</td>
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<tr>
<td>6</td>
<td>extension.oregonstate.edu/programs</td>
</tr>
<tr>
<td>7</td>
<td>outreach.oregonstate.edu/about/strategic-plan/2016</td>
</tr>
</tbody>
</table>

2.C.17 Academic Quality of Program – Review Process

The institution maintains direct and sole responsibility for the academic quality of all aspects of its continuing education and special learning programs and courses. Continuing education and/or special learning activities, programs or courses offered for academic credit are approved by the appropriate institutional body, monitored through established procedures with clearly defined roles and responsibilities, and assessed with regard to student achievement. Faculty representing the disciplines and fields of work are appropriately involved in the planning and evaluation of the institution’s continuing education and special learning activities.
Oregon State University maintains direct responsibility for the academic quality of all of its continuing education programs and courses. INTO OSU English programs are developed in conjunction with appropriate Oregon State faculty. The courses and programs are approved through an expedited process using the Curriculum Proposal System (CPS). The Office of the Registrar ensures that those proposals are recorded and shared with the institution’s Faculty Senate Curriculum Council as part of the expedited process. Noncredit courses are developed by the academic unit wishing to offer the course using standards created and approved by the Faculty Senate Curriculum Council. The course proposals are reviewed for completion by the Office of the Registrar and then submitted to the Faculty Senate Curriculum Council for expedited approval.

**Professional and Continuing Education (PACE)**

PACE offers classes for personal enrichment, lifelong learning and professional development. Classes are market-driven and address a variety of topics. PACE courses do not carry college credit and are offered on a self-support funding model.

**Approval and Monitoring**

In the course development and program improvement processes, instructors are highly involved in the development of course outlines, student learning outcomes and curricula. PACE courses are typically shorter in duration than credit courses and usually present content at an introductory level.

**Academic Quality**

Academic quality of all aspects of PACE classes is maintained and faculty representing the discipline and field of work are appropriately involved in planning and evaluation. Student course evaluations are conducted as a part of the assessment process, and the director of PACE conducts periodic discussions with instructors to review the outcomes of the assessments.

PACE courses are sometimes taught by faculty provided by the colleges, but usually the classes are taught by part-time instructors who have specialized subject matter competency. In situations where certified instructors are required, additional credential checks are collected to ensure the instructor is qualified to teach the subject. PACE has active, ongoing discussions with the appropriate college partners about PACE instructor staffing. In cases where the colleges defer to PACE for instructor sourcing (for lack of faculty interest or specific expertise), the college is informed about instructor screening criteria.

Exhibits 2.C.17

<table>
<thead>
<tr>
<th>#</th>
<th>Evidence Link</th>
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<tbody>
<tr>
<td>1</td>
<td>senate.oregonstate.edu/sites/senate.oregonstate.edu/files/non-credit_rev.pdf</td>
</tr>
<tr>
<td>2</td>
<td>apa.oregonstate.edu/academic-programs/curriculum/submitting-curriculum-proposals</td>
</tr>
<tr>
<td>3</td>
<td>pace.oregonstate.edu</td>
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</table>

**2.C.18 Granting of Credit for Continuing Education**

The granting of credit or Continuing Education Units (CEUs) for continuing education courses and special learning activities is: a) guided by generally accepted norms; b) based on institutional...
RESOURCES AND CAPACITY

mission and policy; c) consistent across the institution, wherever offered and however delivered; d) appropriate to the objectives of the course; and e) determined by student achievement of identified learning outcomes.

The noncredit course standards require that faculty submitting the course for approval include adequate documentation of the course description and syllabus as well as how instruction will meet course objectives and course outcomes so competencies can be measured. INTO OSU courses and programs use similar standards, with particular attention paid to an equitable reflection on the transcript among courses. This is to demonstrate parity of the offering to ensure that outcomes are met and contact hours are similar.

Oregon State University offers a variety of courses for students who need continuing education units (CEUs) to maintain their license or certification status. CEU credit is granted under the same state regulations and institutional curriculum review process as other credit courses.1

CEUs are awarded at the rate of one CEU per 10 hours of instruction for noncredit courses that meet specified criteria. Instructors of continuing education courses use the same processes as credit instructors to assign a grade for students based on the publicized learning outcomes for each course.

Where appropriate and relevant for learners based in specific professions or fields, PACE offers courses that confer CEU credit recognized by specific industry or governmental organizations. Current examples include the Society for Human Resources Management, the Solid Waste Association of North America, the Oregon Department of Agriculture and the International Association of Lean Six Sigma Certification (pending). Otherwise, professionals (such as teachers) typically seek approval of specific CEU-based programs of study from their employers, districts or professional associations. In all cases, CEU credit issuance is based on consistent grading and evaluative standards that represent learner achievement of identified learning outcomes.

2.C.19 Institution’s Records

The institution maintains records, which describe the number of courses and nature of learning provided through noncredit instruction.

INTO OSU courses and noncredit courses are documented on the OSU transcript denoting academic unit and Faculty Senate Curriculum Council-approved course designators, course numbering and standard titles. Noncredit courses are recorded with a grade/mark of SC — successful completion — or NSC — non-successful completion — and listed as 0 credit hours.1 INTO OSU courses are recorded with a grade similar to that of a traditional grading structure (A, A-, B+, B, etc.) but with an E afterward to delineate it is not a grade that will count in the GPA. For instance, grades for INTO OSU noncredit courses would look like this: A E, A-E, B+E, B E, etc. The credit hours are populated based on contact hours similar to credit courses, but the hours do not accumulate or get recorded as earned. The course numbering systems remain in the student information system indefinitely, the academic catalogs are updated and archived annually, and the academic programs are maintained in the student information system indefinitely.

PACE2 also adheres to a consistent record keeping system detailing the number of courses and nature of learning provided through noncredit instruction. These data are maintained on a highly secure online platform that supports and maintains records of learner registrations, course completion and grade issuance.
The privacy policy is available from a link on the PACE Policies webpage. Record-keeping procedures are periodically reviewed to ensure that student, institutional and regulatory needs are addressed.

Upon request, and consistent with FERPA regulations, PACE provides documentation meeting the requirements of the certification or license-granting agency pertaining to instructor credentials, student attendance records, course outlines, course evaluations and evidence of student attainment of the identified learning outcomes.

Exhibits 2.C.19

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<tr>
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<td>registrar.oregonstate.edu/non-credit-courses</td>
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<td>2</td>
<td>pace.oregonstate.edu</td>
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<tr>
<td>3</td>
<td>admininfo.ucsdadm.oregonstate.edu/osu/wtlhelp/privacy.htm</td>
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</table>

### 2.0 STUDENT SUPPORT RESOURCES

#### 2.0.1 Effective Learning Environments and Support

Consistent with the nature of its educational programs and methods of delivery, the institution creates effective learning environments with appropriate programs and services to support student learning needs.

Oregon State University creates effective learning environments for students through a variety of programs and services in six areas of support: access, community, health and wellness, leadership and citizenship, academic success and support, and transition out of the university. Programs and services are provided by the Division of Student Affairs, the Graduate School and individual colleges. Supporting this network is a culture and practice of continuous improvement informed by ongoing assessment and evaluation overseen by the Office of Research, Evaluation and Planning in the Division of Student Affairs, along with the Office of Academic Programs and Assessment (APA), the Graduate School and the eleven colleges.

- **Access:** Student access to OSU includes those programs that increase the likelihood that a potential student will enroll at OSU. It includes the articulation of a mission-aligned enrollment management plan, precollege programs, outreach to at-risk communities, campus visits and sustained financial resources. Examples of programs that advance access are included in Table 1: 2.D.1.

Table 1: 2.D.1

<table>
<thead>
<tr>
<th>Resource</th>
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<tbody>
<tr>
<td>Family Resource Center</td>
<td>familyresources.oregonstate.edu</td>
</tr>
<tr>
<td>Disability Access Services</td>
<td>ds.oregonstate.edu/home</td>
</tr>
<tr>
<td>Office of Financial Aid</td>
<td>financialaid.oregonstate.edu</td>
</tr>
<tr>
<td>Scholarships Office</td>
<td>scholarships.oregonstate.edu</td>
</tr>
<tr>
<td>Human Services Resource Center</td>
<td>oregonstate.edu/hsrc</td>
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</tbody>
</table>
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<thead>
<tr>
<th>New Student Programs and Family Outreach</th>
<th>oregonstate.edu/newstudents/home</th>
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<tbody>
<tr>
<td>Military and Veteran Resources</td>
<td>studentlife.oregonstate.edu/veterans</td>
</tr>
<tr>
<td>NASPA Undergraduate Fellows Program</td>
<td>studentlife.oregonstate.edu/feature-story/naspa-undergraduate-fellows-program-nufp-student-life-programs</td>
</tr>
<tr>
<td>Precollege Programs</td>
<td>oregonstate.edu/precollege</td>
</tr>
<tr>
<td>College Assistance Migrant Program</td>
<td>oregonstate.edu/dept/camp</td>
</tr>
</tbody>
</table>

The Graduate School works with programs to recruit the best and brightest students to OSU. It assists programs with recruitment of diverse students and strategically distributes nearly $5 million in fellowships and scholarships to graduate students and the programs that admit and enroll them. The Graduate School has representation at the Society for the Advancement of Chicano and Native Americans in Science (SACNAS), the California Forum for Diversity in Graduate Education, the Minorities in Agriculture, Natural Resources and Related Sciences (MANRRS) and the National Name Exchange conference. In partnership with individual departments on campus, it also hosts informational and campus recruiting events. For the 2017-18 award cycle, the Graduate School provided six tuition waivers ($70,000 total) as part of the McNair Scholar Incentive Program and issued 53 application waivers for McNair Scholars. Additionally, the Graduate School offered eleven bonuses through the Graduate Diversity Recruitment Bonus Program ($55,000 total), two Thurgood Marshall awards ($8,000 total) and two Diversity Advancement Pipeline Fellowships ($64,000 total). Additional access-related resources for graduate students are included in Table 2: 2.D.1.

Table 2: 2.D.1

<table>
<thead>
<tr>
<th>Resource</th>
<th>Evidence Link</th>
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</thead>
<tbody>
<tr>
<td>Graduate School Financing</td>
<td>gradschool.oregonstate.edu/finance</td>
</tr>
<tr>
<td>Graduate School Awards</td>
<td>oregonstate.edu/dept/grad_school/fellowships.php</td>
</tr>
<tr>
<td>McNair Scholar Incentive Program</td>
<td>gradschool.oregonstate.edu/finance/mcnair</td>
</tr>
<tr>
<td>University Graduate Laurels Block Grant Program</td>
<td>gradschool.oregonstate.edu/finance/university-graduate-laurels-block-grant-program</td>
</tr>
<tr>
<td>National Science Foundation Award</td>
<td>gradschool.oregonstate.edu/finance/fellowships-and-scholarships/nsf-fellows</td>
</tr>
</tbody>
</table>

- **Community**: Development of personal communities is fundamental to student success. It is through such affiliations that students learn to value community involvement, diversity, teamwork and citizenship. Affiliations provide identity anchors and serve as the impetus for optimal engagement in the learning process. These anchors form the basis for continuity and clarity around student roles in a learning community. Examples of undergraduate programs are included in Table 3: 2.D.1.

Table 3: 2.D.1

<table>
<thead>
<tr>
<th>Resource</th>
<th>Evidence Link</th>
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</thead>
<tbody>
<tr>
<td>University Housing and Dining Services</td>
<td>oregonstate.edu/uhds</td>
</tr>
<tr>
<td>Diversity and Cultural Engagement</td>
<td>dce.oregonstate.edu</td>
</tr>
<tr>
<td>Orange Media Network</td>
<td>sli.oregonstate.edu/omn</td>
</tr>
<tr>
<td>Student Leadership and Involvement</td>
<td>sli.oregonstate.edu/orgs/events</td>
</tr>
</tbody>
</table>
Examples of graduate programs that foster community are included in Table 4: 2.D.1.

Table 4: 2.D.1

<table>
<thead>
<tr>
<th>Resource</th>
<th>Evidence Link</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grad Welcome Week, which Includes Graduate School Orientation and Resource Fair, New GTA Orientation and Sessions led by OSU Library Staff</td>
<td>gradschool.oregonstate.edu/grad-welcome-week-2018</td>
</tr>
<tr>
<td>Grad Ambassadors Program</td>
<td>gradschool.oregonstate.edu/resource/9846</td>
</tr>
<tr>
<td>Coalition of Graduate Employees</td>
<td>cge6069.org</td>
</tr>
<tr>
<td>Graduate Student Organizations</td>
<td>gradschool.oregonstate.edu/resource/879</td>
</tr>
<tr>
<td>Diversity and Cultural Engagement</td>
<td>dce.oregonstate.edu</td>
</tr>
</tbody>
</table>

• **Health and wellness:** Healthy living means developing and sustaining wellness with regard to the psychological, social, spiritual, physical, intellectual, cultural and interpersonal dimensions of a student’s life. Programs and services provide opportunities for students to acquire healthy living skills. Acquiring understanding of institutional, cultural and social norms, and learning to adapt successfully to new and changing environments, prepare students to thrive in their current surroundings as well as other environments in which they will live and work. Examples of programs are included in Table 5: 2.D.1.

Table 5: 2.D.1

<table>
<thead>
<tr>
<th>Resource</th>
<th>Evidence Link</th>
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<tbody>
<tr>
<td>Student Health Services</td>
<td>studenthealth.oregonstate.edu</td>
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<tr>
<td>Counseling and Psychological Services</td>
<td>counseling.oregonstate.edu</td>
</tr>
<tr>
<td>Recreational Sports</td>
<td>recsports.oregonstate.edu</td>
</tr>
<tr>
<td>Prevention and Wellness</td>
<td>studenthealth.oregonstate.edu/promotion</td>
</tr>
<tr>
<td>Sports Medicine</td>
<td>osubeavers.com/sports/2012/9/12/208335142.aspx</td>
</tr>
</tbody>
</table>

• **Leadership and citizenship:** Leading and being an engaged citizen are two of the responsibilities of university-educated people. Students must have opportunities to develop and refine their abilities to participate fully as leaders and citizens at OSU. Active citizenship includes students seizing opportunities to use knowledge, skills and education to improve the well-being of themselves and others. Students have the responsibility to assume leadership when needed and to participate fully in ways that encourage active involvement of themselves and others in work that promotes the greater good. Examples of programs are included in Table 6: 2.D.1.
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Table 6: 2.D.1

<table>
<thead>
<tr>
<th>Resource</th>
<th>Evidence Link</th>
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<tbody>
<tr>
<td>Adventure Leadership Institute</td>
<td>recsports.oregonstate.edu/ali</td>
</tr>
<tr>
<td>Center for Leadership Development</td>
<td>sli.oregonstate.edu/lld</td>
</tr>
<tr>
<td>Center for Civic Engagement</td>
<td>sli.oregonstate.edu/cce</td>
</tr>
<tr>
<td>Student Conduct and Community Standards</td>
<td>studentlife.oregonstate.edu/studentconduct</td>
</tr>
<tr>
<td>Leadership Academy</td>
<td>agsci.oregonstate.edu/leadership_academy</td>
</tr>
<tr>
<td>ADELANTE Leadership Advancement Program</td>
<td>liberalarts.oregonstate.edu/centers-and-initiatives/center-latino-studies-and-engagement/students</td>
</tr>
<tr>
<td>Center for Fraternity and Sorority Life</td>
<td>oregonstate.edu/cfsl</td>
</tr>
<tr>
<td>Student Leadership and Involvement</td>
<td>sli.oregonstate.edu/sli</td>
</tr>
<tr>
<td>Orange Media Network</td>
<td>sli.oregonstate.edu/omn</td>
</tr>
<tr>
<td>Graduate School Professional Development</td>
<td>gradschool.oregonstate.edu/graduatestudentssuccess/102</td>
</tr>
</tbody>
</table>

- **Academic success and support:** The academic experience is at the core of a student’s life at OSU. Students often judge their success by their academic achievement. Academic support includes those specifically cultivated relationships with faculty, academic programs, academic advisors and academic support services that increase the likelihood students will be engaged and active learners. Examples of programs are included in Table 7: 2.D.1.

Table 7: 2.D.1

<table>
<thead>
<tr>
<th>Resource</th>
<th>Evidence Link</th>
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</thead>
<tbody>
<tr>
<td>Academic Success Center</td>
<td>success.oregonstate.edu</td>
</tr>
<tr>
<td>Academics for Student-Athletes</td>
<td>oregonstate.edu/studentathlete</td>
</tr>
<tr>
<td>Disability Access Services</td>
<td>ds.oregonstate.edu/home</td>
</tr>
<tr>
<td>Writing Center</td>
<td>writingcenter.oregonstate.edu</td>
</tr>
<tr>
<td>Undergraduate Research and Writing Studio</td>
<td>guides.library.oregonstate.edu/studio</td>
</tr>
<tr>
<td>U-Engage Courses</td>
<td>undergraduate.oregonstate.edu/sites/undergraduate.oregonstate.edu/files/asst/documents/updatedstart17_course_handout.pdf</td>
</tr>
<tr>
<td>College Student Services Administration Program</td>
<td>liberalarts.oregonstate.edu/slc/cssa</td>
</tr>
<tr>
<td>Women and Minorities in Engineering/LSAMP</td>
<td>academics.engr.oregonstate.edu/node/19</td>
</tr>
<tr>
<td>Educational Opportunities Program</td>
<td>oregonstate.edu/dept/eop</td>
</tr>
<tr>
<td>TRiO Student Support Services</td>
<td>oregonstate.edu/dept/ss/home</td>
</tr>
<tr>
<td>Mathematics Learning Center</td>
<td>math.oregonstate.edu/mlc</td>
</tr>
<tr>
<td>Student Ombuds Office</td>
<td>ombuds.oregonstate.edu</td>
</tr>
</tbody>
</table>

Additional resources for graduate student academic success and support are included in Table 8 2.D.1.
• **Transition out of the university:** Transitioning out of the university includes leaving the institution successfully and with an invitation to return or sustain engagement. It includes having access to preparation for a successful career, the rituals involved in graduation, as well as programs and services that place the university experience into life-influencing milestones. Examples of programs are included in Table 9: 2.D.1.

**Table 9: 2.D.1**

<table>
<thead>
<tr>
<th>Resource</th>
<th>Evidence Link</th>
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<tbody>
<tr>
<td>Commencement</td>
<td>commencement.oregonstate.edu</td>
</tr>
<tr>
<td>Career Development Center</td>
<td>career.oregonstate.edu</td>
</tr>
<tr>
<td>Alumni Association</td>
<td>osualum.com</td>
</tr>
<tr>
<td>College of Business Career Success Center</td>
<td>business.oregonstate.edu/careers</td>
</tr>
</tbody>
</table>

Examples of graduate programs are included in Table 10: 2.D.1.

**Table 10: 2.D.1**

<table>
<thead>
<tr>
<th>Resource</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Center for Teaching and Learning</td>
<td>oregonstate.edu/ctl</td>
</tr>
<tr>
<td>Graduate Certificate in College and University Teaching</td>
<td>gradschool.oregonstate.edu/gccut</td>
</tr>
</tbody>
</table>

Using this framework, the divisions of Student Affairs and Faculty Affairs, along with the Graduate School and colleges, have provided a network of support services to help meet student needs and support their success at OSU. These services and resources are available to all students, but there are additional resources and services specifically targeting students enrolled at OSU-Cascades and online via Ecampus.

**OSU-Cascades**

OSU-Cascades supports access and retention through student resources and cocurricular activities implemented by the Student Success Center. OSU-Cascades relies on the Corvallis campus for financial aid and scholarships, disability access services and veterans support while providing an advisor interface for students in each area. Community at OSU-Cascades develops through a variety of services that are critical to student success with academic, mental and physical well-being. The OSU-Cascades Student Care Team interfaces with the Student Care Team in Corvallis, and there is one code of conduct and community standards for all students. Academic success and support at OSU-Cascades is a joint effort between faculty, academic advisors and academic support services. Experiential education is an important component of student success at OSU-Cascades, and all students are encouraged to participate. There are additional resources as students transition out of OSU-Cascades.
More information about OSU-Cascades student resources is included in Table 11: 2.D.1.

Table 11: 2.D.1

<table>
<thead>
<tr>
<th>Resource</th>
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<tr>
<td>Student Success Center</td>
<td>osucascades.edu/studentsuccesscenter</td>
</tr>
<tr>
<td>First-Year Experience</td>
<td>osucascades.edu/first-year-experience</td>
</tr>
<tr>
<td>Residential Life</td>
<td>osucascades.edu/uhds</td>
</tr>
<tr>
<td>Cascade Adventures</td>
<td>osucascades.edu/cascades-adventures</td>
</tr>
<tr>
<td>Office of Student Life</td>
<td>osucascades.edu/studentlife</td>
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<tr>
<td>Student Wellness</td>
<td>osucascades.edu/student-wellness</td>
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<tr>
<td>Associated Students of Cascades Campus (ASCC)</td>
<td>osucascades.edu/ASCC</td>
</tr>
<tr>
<td>OSU-Cascades Student Fee Committee (SFC)</td>
<td>osucascades.edu/sfc</td>
</tr>
<tr>
<td>Learning Lab</td>
<td>osucascades.edu/learning-lab</td>
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<td>OSU-Cascades Diversity Committee</td>
<td>osucascades.edu/diversity</td>
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<td>Commencement</td>
<td>osucascades.edu/commencement</td>
</tr>
<tr>
<td>OSU-Cascades Career Development Center</td>
<td>osucascades.edu/cdc</td>
</tr>
</tbody>
</table>

**Ecampus**

In addition to the extensive on-campus support available to all students regardless of their enrollment status, OSU assists students taking courses online for credit and at a distance through Ecampus. Examples of activities that support Ecampus include:

- Assistance via phone and email to answer student inquiries regarding procedures and university policies and facilitating conflict resolution between students and faculty.
- Preadmissions enrollment services, unofficial transcript review and student success coaching.
- Online orientation and Ecampus Learning Community to assist students with transition to OSU.
- Ecampus students have access to a number of online career development tools (Handshake, Interview Stream, Internship Predictor, OSU Career Guide, VMock) and videos.
- Financial-need and hardship grants targeted specifically to provide additional need-based aid to degree-seeking distance students.
- Linkage with community colleges statewide and in Hawaii through the Degree Partnership Program.
- Coordination with academic advisors in academic units and special Ecampus advisors in each unit.
- Assistance with student registration, records and petitions.
- Online connections to student resources, such as financial aid, services for students with disabilities and the writing center.
- Ecampus quarterly email newsletter for prospects.
- Arrangements for and management of test proctoring.
- Online tutoring services.
- Online student services, including a searchable knowledge base.
• Access to an OSU librarian who specializes in the needs of online learners.
• Technical support, coordinated with the OSU Computer Help Desk, and Canvas support.
• Annual student survey of services and needs.
• Access to an online learning community, including resources and tutorials on accessing student services.

OSU Ecampus also provides funding for each academic unit that offers online degree and course options for academic advising and program coordination, as well as ongoing professional development for faculty members to improve teaching and student support.

A link to information about Ecampus support services is included in Table 12: 2.D.1.

Table 12: 2.D.1

<table>
<thead>
<tr>
<th>Resource</th>
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<tbody>
<tr>
<td>Ecampus Student Resources</td>
<td>ecampus.oregonstate.edu/services/student-services</td>
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</tbody>
</table>

2.0.2 Student Safety and Security of Facilities

The institution makes adequate provision for the safety and security of its students and their property at all locations where it offers programs and services. Crime statistics, campus security policies and other disclosures required under federal and state regulations are made available in accordance with those regulations.

Student safety and security are top university priorities, as is the protection of assets. Both OSU campuses in Corvallis and Bend utilize the robust Department of Public Safety, which provides comprehensive security services, including, but not limited to: campus patrols, rapid emergency response, safety planning consultations and reviews of existing plans, resource referrals, vehicle roadside assistance (i.e., jump starts), threat assessments, and safety escorts. Officers are empowered with the authority to request identification of any person present on campus when safety concerns dictate. Public Safety complies with and enforces all Oregon State University policies and standards and has the authority to issue exclusion orders as required.

Campus Safety and Security

Oregon State Police law enforcement services are contracted by the university for the Corvallis campus. State police troopers have complete police authority and may enforce state and federal statutes on campus. The Bend Police Department has jurisdiction at the OSU-Cascades campus, and it has full authority to enforce municipal, state and federal statutes. Reportable criminal activity at the Hatfield Marine Science Center (HMSC) is referred to the Newport Police Department, which has the same applicable authority for HMSC. TCB Security Services Inc. performs exterior patrols after hours at HMSC.

Emergency Management

OSU has implemented and maintains effective emergency response plans to any immediate threats to the health or safety of students, employees or visitors. When an incident is reported and confirmed by university officials, an emergency notification is instantly sent out and law enforcement notified for
response, as applicable, following the university’s emergency response plans. Examples of immediate threats include an approaching forest fire or an armed intruder.

Situations are evaluated on a case-by-case basis and continually assessed until the incident is resolved. Students and employees are automatically signed up to receive emergency notifications through their university-issued email addresses, with options for additional points of contact to be added via AT&T Rave Guardian, OSU’s Alert portal.

The Hatfield Marine Science Center (HMSC) utilizes dual emergency notification systems, depending on the scope of the incident. For events impacting the community that includes HMSC, the Lincoln County Sheriff’s Office may issue an advisory through the Nixle Emergency Notification System. Information from this system is received by students and personnel via mobile phone and email. For events at HMSC, a HMSC-specific version of the OSU Alert system will send a notification of any significant emergency or immediate threat to students or personnel. HMSC’s emergency manager keeps a database of all students and employees, who are automatically signed up to receive emergency notifications through their university issued email addresses. Individuals are also encouraged to add alternate contact information, such as cell phone numbers, through Rave. In the event of an earthquake and tsunami, HMSC personnel are trained to follow clear evacuation measures to reach specific gathering locations outside (i.e., above) the tsunami zone with planning and procedures of what to expect/how to operate in the minutes, hours, days, weeks and months following such an event available in the Continuity of Operations Plan.

For more details related to OSU’s emergency preparedness, see Standard 3.A.5.

**Annual Crime Statistics Reporting**

The Annual Security and Fire Safety Reports provide the OSU community with actionable information and resources to make informed decisions on personal safety possible. Included among these are campus crime statistics, details on the latest security and access policies, critical resource assets and educational programs for all students and staff. The policies in the Annual Security and Fire Safety Reports apply to all campuses unless otherwise specified.

**Campus Security Policies**

Oregon State University has implemented numerous policies to specifically address campus security. These policies directly intersect with the university’s Student Code of Conduct and Employee Code of Conduct, ensuring campuswide understanding of expectations and actions to ensure collective and individual safety.

**Disclosures Required Under Federal and State Regulations**

Developed in compliance with the Jeanne Clery Disclosure of Campus Security Policy and Campus Crime Statistics Act (Clery Act), the Annual Security and Fire Safety Reports for the Corvallis campus, OSU-Cascades, Hatfield Marine Science Center and Eastern Oregon University inform current and prospective students and employees of the Clery Act crimes reported within the Clery Act geography of Oregon State University in the three most recent calendar years. The report also contains information about fire safety practices and fire statistics for on-campus student housing facilities at each location.

Each year, an email notice is sent to university employees and students informing them of the availability of the report. This email also points to the Clery Act Compliance website.

OSU abides by all disclosures required under federal and state regulations by maintaining and making available a 60-day crime log available on request. OSU’s experienced emergency response team is in charge providing guidance for sending out timely warnings and emergency notifications to all locations.
Exhibits 2.0.2

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<td>4</td>
<td>osucascades.edu/sites/osucascades.edu/files/public-safety/2016-09-02-16_eop.pdf</td>
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<td>5</td>
<td>hmsc.oregonstate.edu/sites/hmsc.oregonstate.edu/files/hatfield_eop_2015_final.pdf</td>
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<tr>
<td>6</td>
<td>clery.oregonstate.edu/campus-alerts-timely-warnings-and-emergency-notifications</td>
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<td>7</td>
<td>nixle.com</td>
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<td>hmsc.oregonstate.edu/sites/hmsc.oregonstate.edu/files/tsunami_evacuation_flyer101716.pdf</td>
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<td>10</td>
<td>clery.oregonstate.edu/annual-reports</td>
</tr>
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<td>studentlife.oregonstate.edu/code</td>
</tr>
<tr>
<td>12</td>
<td>clery.oregonstate.edu</td>
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</tbody>
</table>

2.0.3 Recruiting, Admitting and Orienting Students

Consistent with its mission, core themes and characteristics, the institution recruits and admits students with the potential to benefit from its educational offerings. It orients students to ensure they understand the requirements related to their programs of study and receive timely, useful and accurate information and advising about relevant academic requirements, including graduation and transfer policies.

The expansion and enrollment growth of Oregon State University’s student body during the past decade has had significant impact on Oregon’s land grant university. The addition of approximately 12,000 students during this past decade has brought enrollment to more than 32,000 students — including the largest share of Oregonians of any university in this state. The student body includes greater percentages of high-achieving, historically underrepresented and international students than ever before. In particular, the growth among high-achieving students has helped OSU become known more publicly as the leading university of choice for Oregon’s best and brightest high school graduates.

Continued enrollment growth is critical to meet both the letter and spirit of Oregon’s 40-40-20 initiative, which states 40 percent of Oregonians will obtain a four-year degree, 40 percent will obtain a two-year
degree or certificate and 20 percent will earn a high school diploma or the equivalent. Growth also is critical to advance OSU’s progress toward its goal of becoming one of America’s top 10 land grant universities. However, recent and projected enrollment trends point toward declining enrollments among traditional on-campus freshmen. To help the university plan more effectively for future enrollment, the Enrollment Management Task Force and Enrollment Planning Steering Committee have been working with campus partners to develop and refine a comprehensive enrollment management plan. This plan, which is composed of academic college-level plans, considers such factors as demand characteristics of potential students, diversity of the incoming class, retention of current students, the potential effects of the types of students recruited to enroll at OSU, the educational experience, revenue growth and OSU’s access mission as a land grant university.

Within the context of enrollment management planning, strategies to shape enrollment are considered to achieve enrollment objectives, including the use of predictive modeling for marketing and financial aid to reach targeted markets and populations. It also considers the requirements of a university-wide effort on recruitment and retention, including the role of the offices of Admissions, Student Affairs, Faculty Affairs, as well as colleges and academic units in recruiting and retaining a high-performing, diverse student body.

The enrollment management team includes the offices of Admissions, Precollege Programs, Registrar, Financial Aid and Scholarships. It works with other units across the campus, as well as high school counselors, community college partners, the Degree Partnership Program, community-based organizations and others to meet enrollment management goals regarding access, quality, diversity and potential for success.

Examples of processes and programs related to recruitment and orientation for undergraduates include:

- The Degree Partnership Program (DPP) enables students to be admitted to a community college and OSU at the same time, meeting all requirements for admission to the community college and OSU. DPP students may elect to take courses at the community college, OSU or both during a term. Course articulations are in place, and advisors are trained to help with course selection, financial aid and other systems to ensure that students have a successful experience.

- OSU has been a national leader in holistic admissions assessment with the development and implementation of OSU’s Insight Résumé. This additional admission requirement has aided in determining ability to succeed as a new undergraduate student at OSU by assessing non-cognitive attributes in addition to more traditional academic measures. Requirements for admission, the online application and descriptions of services and programs are on the OSU admission website.

- The Office of Admissions coordinates targeted approaches to student recruitment and works with college-level recruiting partners on aligned, efficient strategies that are consistent with OSU’s brand and mission and that accomplish both unit-level and institutional enrollment goals.

- New Student Programs and Family Outreach (NSPFO) supports the process of transition to college for new students and their family members through educational programs and outreach efforts. New first-year and transfer undergraduate students participate in orientation activities designed to ensure they understand Bacc Core and major requirements, campus resources and university policies and procedures. Orientation activities are designed to encourage connection with other new and returning students and to develop or increase a sense of belonging for the student. Programs include the summer START orientation and advising program, and the fall Welcome Week orientation, which
feature educational and social events to help new students transition to campus and the Corvallis community. All orientation programs also include sessions for parents and family members of new students to learn how to best support their student.

- An extended orientation course, U-Engage, builds on initial orientation experiences. This outreach program engages students in inquiry, reflection on educational activities and practice with critical analysis. The course also introduces campus resources and develops a sense of belonging and contributing to a diverse community. The course also emphasizes the role of the Bacc Core and the university’s expectation that students be active and self-directed learners. Academic colleges, schools and departments also provide orientation courses that both familiarize students with the campus and its many resources and serve as an orientation to the discipline.

- Students at OSU-Cascades have the same admission requirements as students attending the Corvallis campus. Requirements for admission, selection processes and deadlines, the online application and descriptions of services and programs are published online in a distinct OSU-Cascades website.

- OSU-Cascades requires degree-seeking students to attend either Transfer START or First-Year START, which is offered several times each term and helps support the process of transition to college for new students and their family members. At these orientations, students receive information about tuition, financial aid, payments, campus policies and student support services in addition to meeting with an advisor and registering for classes. Students attending START receive a packet of materials including a registration handbook with student success information and academic regulations. OSU-Cascades also hosts a Welcome Week and offers U-Engage classes.

- OSU has a strategic partnership with INTO University Partnerships, a private corporation that recruits English language learners from across the globe to OSU and provides defined pathways to undergraduate degree programs.

**Graduate Student Recruitment, Admissions and Orientation**

The Graduate School offers a welcome reception, new graduate student orientation, new graduate teaching assistant orientation and a campus resource fair for all incoming graduate students, accompanied by several specialized workshops. Individual graduate programs also provide orientation programs and handbooks for newly admitted students. Applications for graduate admissions undergo two reviews. The first review is conducted by graduate faculty in the academic area to which the applicant applies. This review is program-specific and takes into consideration the capacity and availability of faculty mentors. A second review is conducted by Graduate School staff. This review is conducted to ensure applicants recommended for admission have met OSU minimum standards. This review includes confirmation that the undergraduate degree and institution of the applicant is acceptable, minimum GPA requirements have been met and minimum language requirements have been met by international applicants. Minimum admissions requirements are published in the Graduate Catalog and on the graduate admissions website. Graduate admissions information for OSU-Cascades can also be found on the graduate admissions website. Additional information about graduate admissions is provided in section 2.C.13.

The Graduate School has focused efforts on the recruitment, retention and completion of meritorious and diverse students. To this end, the Graduate School staff attend and/or send representatives to a number of regional and national meetings that focus on providing transitional support to underrepresented students with the intent of recruiting new students. The Graduate School also administers numerous awards, scholarships and prestigious fellowships that build capacity in these areas by supporting underrepresented minority students or those who demonstrate financial need. The Graduate School also
RESOURCES AND CAPACITY

offers ongoing professional development programming via the Student Success Initiative. The Graduate School’s program and services offerings are graduate-student focused and specifically meet the unique needs of graduate students as they relate to teaching, research, writing, communication, leadership and career development.

Exhibits 2.D.3

<table>
<thead>
<tr>
<th>#</th>
<th>Evidence Link</th>
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<tbody>
<tr>
<td>1</td>
<td>Enrollment Management Strategies and Tactics to Shape the Enrollment at OSU enrollmentmanagement.oregonstate.edu</td>
</tr>
<tr>
<td>2</td>
<td>Degree Partnership Program partnerships.oregonstate.edu/students</td>
</tr>
<tr>
<td>3</td>
<td>OSU Admissions admissions.oregonstate.edu</td>
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<tr>
<td>4</td>
<td>Insight Résumé admissions.oregonstate.edu/sites/admissions.oregonstate.edu/files/insight_resume_worksheet.pdf</td>
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<tr>
<td>5</td>
<td>New Student Programs and Family Outreach newstudents.oregonstate.edu</td>
</tr>
<tr>
<td>6</td>
<td>OSU-Cascades Admissions osucascades.edu/admissions</td>
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<td>7</td>
<td>OSU-Cascades START osucascades.edu/admissions/cascades-start</td>
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<td>8</td>
<td>OSU-Cascades Transfer START osucascades.edu/transfer-start</td>
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<td>9</td>
<td>OSU-Cascades First Year Experience Course osucascades.edu/first-year-experience/first-year-experience-courses</td>
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<td>10</td>
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<tr>
<td>11</td>
<td>Graduate School gradschool.oregonstate.edu</td>
</tr>
<tr>
<td>12</td>
<td>Graduate Student Success Initiative gradschool.oregonstate.edu/graduate-student-success</td>
</tr>
</tbody>
</table>

2.D.4 Program Elimination or Significant Change in Requirements

In the event of program elimination or significant change in requirements, the institution makes appropriate arrangements to ensure that students enrolled in the program have an opportunity to complete their program in a timely manner with a minimum of disruption.

Oregon State University’s Academic Catalog publishes the rights available to students related to program elimination or significant change in requirements including the possibility of the need to suspend, eliminate or make drastic changes to a program. The policy describes that when/if changes must be made to existing programs, students who are already admitted into the programs will be reasonably accommodated. Additionally, the institution manages program suspensions through the Suspending a Program/Suspensions Policy made available by the Office of Academic Programs and Assessment (APA). Academic units are required to process the change through the formal curriculum system that includes review by the academic unit, the college, faculty governance councils and administrative offices. Once a program is suspended, per policy, no new students are admitted to that program. However, reasonable accommodations are made to students who matriculated prior to the suspension. Course substitutions/
alternative course offerings are considered reasonable and may be considered and approved to support the opportunity to complete the program in a timely manner with minimum disruption. Substitutions are regulated by the stipulations of Academic Regulation 28. The Office of the Registrar guides these programs to complete teach-out without requiring substitutions until the last entering students have been able to complete requirements in a reasonable time frame. Academic programs stay in suspension for three years before a formal decision is made to either reinstate, terminate or suspend one additional year before making a formal decision. Reasonable accommodations are typically handled through academic advising in the academic program and their use of the degree audit tool to create course substitutions or course exceptions, or to force complete decisions about the requirements that can no longer be met by available courses.

Exhibits 2.D.4

<table>
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<td>Suspending a Program Policy <a href="apa.oregonstate.edu/suspensions-suspending-program">apa.oregonstate.edu/suspensions-suspending-program</a></td>
</tr>
<tr>
<td>2</td>
<td>Academic Regulation 28 <a href="catalog.oregonstate.edu/regulations">catalog.oregonstate.edu/regulations</a></td>
</tr>
</tbody>
</table>

2.0.5 Publication of Current and Accurate Information

The institution publishes in a catalog, or provides in a manner reasonably available to students and other stakeholders, current and accurate information that includes:

- Institutional mission and core themes
- Entrance requirements and procedures
- Grading policy
- Information on academic programs and courses, including degree and program completion requirements, expected learning outcomes, required course sequences and projected timelines to completion based on normal student progress and the frequency of course offerings
- Names, titles, degrees held and conferring institutions for administrators and full-time faculty
- Rules, regulations for conduct, rights and responsibilities
- Tuition, fees and other program costs
- Refund policies and procedures for students who withdraw from enrollment
- Opportunities and requirements for financial aid
- Academic calendar

Oregon State University uses the Academic Catalog and its searchable website to provide students and other stakeholders current information about its academic programs, staff and faculty and regulations and policies. The information is updated regularly to ensure accuracy and currency and to maintain the institution's integrity through transparency of programs and rules. Table 2.D.5 includes a comprehensive list of the information maintained for stakeholders.
### Table 2.D.5

<table>
<thead>
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<th>Information Published for Students and Public</th>
<th>Relevant Site</th>
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<tbody>
<tr>
<td>Institutional Mission and Core Themes</td>
<td>Office of the Provost: Our Mission and Goals</td>
<td>leadership.oregonstate.edu/provost/our-mission-and-goals</td>
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<tr>
<td></td>
<td>Office of the Provost: Our Core Themes and Objectives</td>
<td>leadership.oregonstate.edu/provost/our-core-themes-and-objectives</td>
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<td>Entrance Requirements and Procedures</td>
<td>Office of Admissions</td>
<td>admissions.oregonstate.edu</td>
</tr>
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<td>Grading Policy</td>
<td>Academic Catalog: Grades, Regulations and Records</td>
<td>catalog.oregonstate.edu/grades-regulations-records</td>
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<td>Information on Academic Programs</td>
<td>Academic Catalog: Programs</td>
<td>catalog.oregonstate.edu/programs</td>
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<td>Names, Titles, Degrees Held and Conferring Institutions for Administrators and Full-Time Faculty</td>
<td>Senior Administrators</td>
<td>leadership.oregonstate.edu/provost/senior-administrators</td>
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<td>Rules and Regulations for Conduct, Rights and Responsibilities</td>
<td>Academic Catalog: Academic Regulations</td>
<td>catalog.oregonstate.edu/regulations</td>
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<td></td>
<td>Office of Student Life: Student Conduct and Community Standards</td>
<td>studentlife.oregonstate.edu/studentconduct</td>
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<td>Tuition, Fees and Other Program Costs</td>
<td>Academic Catalog: Tuition, Fees and Payment</td>
<td>catalog.oregonstate.edu/fees-residency-requirements</td>
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<td>Ecampus Tuition and Fees</td>
<td>ecampus.oregonstate.edu/services/tuition</td>
</tr>
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<td>Refund Policies and Procedures for Students who Withdraw from Enrollment</td>
<td>Academic Catalog: Drop/Withdraw Refunds</td>
<td>catalog.oregonstate.edu/fees-residency-requirements</td>
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<td>Opportunities and Requirements for Financial Aid</td>
<td>Office of Financial Aid</td>
<td>financialaid.oregonstate.edu</td>
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<td>Academic Calendar</td>
<td>Office of the Registrar: OSU Academic Calendar</td>
<td>registrar.oregonstate.edu/osu-academic-calendar</td>
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### Exhibits 2.D.5

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<td>oregonstate.edu</td>
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2.D.6 Publications Related to Licensure Requirements

Publications describing educational programs include accurate information on: a) national and/or state legal eligibility requirements for licensure or entry into an occupation or profession for which education and training are offered; and b) descriptions of unique requirements for employment and advancement in the occupation or profession.

In addition to providing information about degree programs in the university catalog, individual colleges, units and the Office of Admissions provide students with online and print information about various state and national licensing requirements associated with the field. For example, the College of Education provides public details, including contact information about state licensing requirements.1

OSU-Cascades provides counseling licensing requirements and public information including contact information related to programs that offer licenses.2 OSU-Cascades provides state education licensing as well, and these details are also made public through the College of Education's Master of Arts in Teaching program.3 The College of Forestry provides the Bachelor of Science in Forest Engineering, which meets the administrative rules established by the Oregon State Board of Examiners for Engineering and Land Surveying (OSBEELS). As evidence of adequate preparation for the Fundamentals of Engineering Examination, students take the first of two examinations required for professional engineering licensing. The B.S. in Forest Engineering, with the completion of appropriate program electives, also meets the OSBEELS administrative rules for evidence of adequate preparation for the Fundamentals of Land Surveying Examination, the first of two examinations required for professional land surveyor licensing.4

The College of Science provides programs for students preparing for health professions including medical, dental, pharmacy and nursing. Details related to pathways that may require licensure are made available online.5

Exhibits 2.D.6

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2.D.7 Student Records

The institution adopts and adheres to policies and procedures regarding the secure retention of student records, including provision for reliable and retrievable backup of those records, regardless of their form. The institution publishes and follows established policies for confidentiality and release of student records.
University Standard 576-020 describes OSU’s policy regarding secure retention of student records, retention of records and confidentiality of such records. OSU ensures the confidentiality, availability and integrity of all student records, including academic, student employment, financial aid (and financial in nature), student treatment and all other records that are official student records. This is achieved through employee performance of duties and adherence to university policy and processes. Policies apply best practices in managing and monitoring data security using both tools and a security awareness program. Oversight is achieved through the use of annual audit processes, both internal and external.

**Security and Student Records: FERPA Compliance and Training**

The institution data management policy is applicable to all university units, employees, students, visitors, contractors and affiliates, as well as anyone who produces, manages or accesses university data. This institution data management policy establishes a framework for the university to comply with all federal and state laws and regulations related to data security and data management. Access to the student information system, databases and warehouse data are role-based, and individuals are provided access based upon a legitimate educational interest. Those with access must meet training requirements established by data custodians and institutional governance. Formal training about the Family Educational Rights and Privacy Act (FERPA) is required of anyone accessing student data using these systems. To pass the training, a participant must score higher than 80 percent on the assessment included in the training. Access is awarded only after successful completion of the training. The institution notifies students annually of their legal rights related to their student record. OSU has an established retention schedule that includes student records.

The Office of Information Security manages security incidents and proactively addresses potential security vulnerabilities. Systems of record-storing student data undergo an annual audit conducted by an external agency in addition to an annual self-assessment. This annual self-assessment is performed to ensure best practices are being used to secure administrative systems. This includes recurring practices for redacting confidential information when appropriate; using network segmentation, stateful and application firewalls, multifactor authentication and standard practices for change management, vulnerability scanning, log auditing and review, and network monitoring for suspicious activity. Mandatory security awareness training is required for all full-time employees.

**Exhibits 2.D.7**

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**2.D.8 Financial Aid Program**

The institution provides an effective and accountable program of financial aid consistent with its mission, student needs and institutional resources. Information regarding the categories of financial aid...
assistance (such as scholarships, grants and loans) is published and made available to prospective and enrolled students.

The Office of Financial Aid\(^1\) and the Scholarship Office\(^2\) administer financial aid and scholarships in accordance with Oregon State University’s mission, as well as state and federal laws and regulations.\(^1\) OSU offers a wide range of financial support and services to its students, including providing in-person, individual financial aid advising. The Office of Financial Aid assists students with funding their education-related expenses, so that all qualified students can pursue an education at OSU.\(^1,4\) Financial aid includes grants, scholarships, employment and loans. The financial aid website provides detailed information on the financial aid process, timelines, deadlines, types of aid, costs and eligibility. Financial aid information is also made available to students and their families in brochures, publications, presentations, emails and letters. The Office of Financial Aid also assists students with loan counseling for new borrowers and repayment counseling for students graduating or leaving OSU before graduation.\(^4,5\) The Office of Financial Aid provides loan information workshops throughout the award year and works with the Office of Business Affairs to provide financial literacy and money management educational programs for students.\(^6\) OSU-Cascades offers in-person financial aid, scholarship and financial literacy workshops for its students.\(^3\)

Current and prospective students can use the financial aid website to calculate an estimated cost of attendance. Based upon this calculation, the students can then use the net price calculator\(^7\) and scholarship calculator\(^8\) to estimate their net price and review available resources. Incoming freshman scholarships are awarded based on merit and need. Merit awards are determined through published academic criteria, including GPA and standardized test scores.

The Office of Financial Aid provides financial reports to various federal and state agencies for compliance and to ensure accountability. The office is also audited by an outside auditor and is subject to federal program review audits.

Exhibits 2.D.8

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2.D.9 Student Repayment Obligations, Loan Programs and Institution’s Loan Default

Students receiving financial assistance are informed of any repayment obligations. The institution regularly monitors its student loan programs and the institution’s loan default rate.
Oregon State University notifies students of any repayment obligations incurred as a result of their participation in various loan programs. Further, the Office of Financial Aid provides loan counseling and repayment counseling for students who incur debt from student loan programs. Information on types of loans, loan repayment options and avoiding default can be found on the financial aid website. OSU regularly monitors its student loan programs and the institution’s loan default rate.

OSU also participates in the following aid programs: Federal Perkins Loan Program (2017-18 is the last year for disbursements from this program, as it has been discontinued by the federal government), the William D. Ford Federal Direct Loan (Direct Loan) Program and the OSU Loan Program. In the Direct Loan Program, OSU participates in the subsidized, unsubsidized, Parent PLUS and Graduate PLUS programs. The 2015-16 cohort default rate for the Perkins Loan Program was 13.81 percent, and for 2016-17 the default rate was 13.12 percent. In 2014, the cohort default rate for the Direct Loan Program was 3.8 percent. Due to the low volume of OSU loans, a cohort default is not calculated. Beginning in the 2018-19 academic year, OSU provides all students with a summary of their federal student loan debt to date, the percentage of their borrowing limit reached, an estimated total payoff and an estimated monthly payment. In addition to this annual loan debt notification, OSU produces the Student Loan Debt Project. This publication provides information on the return on investment, employment and financial aid statistics about OSU, as well as answers to many of the questions that have become the focus of the debate on the true value of earning a degree. This report is available to colleges and others on the Enrollment Management website. Student statistics can be found in an online publication, Investing in Your Future.

Exhibits 2.D.9

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2.D.10 Academic Advising

The institution designs, maintains and evaluates a systematic and effective program of academic advisement to support student development and success. Personnel responsible for advising students are knowledgeable of the curriculum, program requirements and graduation requirements and are adequately prepared to successfully fulfill their responsibilities. Advising requirements and responsibilities are defined, published and made available to students.
Academic advising is integral to the quality of Oregon State University’s educational programs. Quality academic advising includes both the prescriptive elements of advising — assisting with course selection, maintaining curriculum checklists, tracking degree progress and completing degree audits — and the developmental aspects of advising major and career decision-making, integration in campus and academic cultures and assistance with and referrals for issues affecting a student’s academic success. While advising services are tailored to the unique needs of student populations and disciplinary cultures, advising practices across campus are aligned according to a set of shared principles.

**Advising Structure: Undergraduate Programs**

Undergraduate academic advising is delivered through advising offices located within colleges, at OSU-Cascades, the Office of International Services, Ecampus and one centralized office for the University Exploratory Studies Program (UESP). UESP serves undeclared students and students considering a change of major. Ecampus maintains a central student services office for distance learners and works with advisors who specialize in working with distance students in academic units. Additionally, Ecampus provides scalable funding for advising for online undergraduate degree programs. OSU-Cascades has a central advising office staffed by professional advisors who work in close communication with departmental advisors in Corvallis.

Two advising delivery models are used in the colleges. The colleges of Science, Engineering, Liberal Arts and Agricultural Sciences employ a split model in which a central advising office staffed by professional advisors work in concert with advising offices located in individual departments. The remaining colleges — Forestry; Earth, Ocean, and Atmospheric Sciences; Public Health and Human Sciences; Business; Pharmacy; and Education, along with the Honors College, UESP and OSU-Cascades — have centralized advising offices. In all colleges, advising is coordinated by a head advisor who reports directly to the college dean or the associate dean with purview over undergraduate education. The head advisor also works with campuswide advising committees on matters of training, curriculum planning, professional development, technology, assessment, strategic planning, policy and process.

Advising is coordinated across campus through the efforts of two university-wide bodies:

- The Council of Head Advisors (CHA) is composed of the head advisor from each college and meets monthly to address curricula, policies, student orientations, advisor professional development and other issues of importance to academic advising. The CHA plays a critical role in supporting consistent advising practices and interpretations of academic policies across academic units.

- The Academic Advising Council (AAC) is a Faculty Senate committee with both voting and nonvoting membership. Voting members include the head advisors from all undergraduate colleges as well as a representative from OSU-Cascades, the Honors College, UESP, the Office of Academic Achievement, Diversity and Cultural Engagement, Enrollment Management, International Programs, Office of the Dean of Student Life, Ecampus, and an ASOSU student representative.

Non-voting members of the AAC include units whose work may affect academic advising, but whose mission, goals or responsibilities largely lie outside of academic advising (e.g., Academic Success Center and Disability Access Services). In concert with the vice provost for student affairs, the Office of Academic Achievement and the director of Cross Campus Strategic Initiatives oversees the development, implementation and assessment of campuswide advising initiatives to support excellence in undergraduate advising. This supervision ensures coordination with student success initiatives like early alert, experiential learning, orientation courses and academic support resources. It further functions to
accommodate university-wide training of new academic advisors and academic counselors (the four-part New Advisor Retreats) and ongoing professional development opportunities via Advising Town Halls and the Advisor Coffee Talks series.

In addition to the organizational structure listed above, technology solutions also constitute a critical function. MyDegrees is a degree audit tool that contributes greatly to academic planning and decision-making. Students also have access to consistent, accurate information with which to monitor degree progress, and they benefit from more comprehensive, timely guidance from advisors to support their academic success and engagement. OSU-Cascades advisors supplement MyDegrees with advising guides and degree checklists to support students in each major.

**Advising Structure: Graduate Programs**
Each of the 80+ graduate majors has a program director, coordinator and/or advisor who have primary advising responsibilities for students. The Graduate School provides centralized support related to graduate students’ progression and timely degree completion. In conjunction with academic colleges across campus, the Graduate School admits students, tracks and facilitates academic progress, audits students’ programs of study and certifies degrees and certificates. Additionally, the Graduate School provides professional development related to issues of graduate student success (e.g., mentorship, graduate policies and academic progress).

**Advising Structure: Professional Programs**
The Office of Student Services within the College of Pharmacy provides centralized advising and support for Pharm.D. students. Students are invited to schedule appointments or stop by as needed. However, Pharm.D. students are required to meet with an academic advisor at least four times while enrolled in the program. The required advising conversations are designed to address specific areas of personal and professional development and span the first, second and third years of the Pharm.D. program.

Additionally, the Office of Student Services within the College of Pharmacy admits students, tracks academic progress, program requirements and degree completion, providing early intervention advising as necessary.

The dean’s office of the Carlson College of Veterinary Medicine provides centralized support for professional DVM students’ advising, academic progression and degree completion. Once enrolled, DVM students receive advising by assigned faculty mentors, peer tutors, the associate dean for student and academic affairs, the student services coordinator and the student progress committee within the college.

**Advising at Multiple Stages: Undergraduate Programs**
**Prospective Students:** OSU advisors are actively involved with helping prospective students determine how OSU can meet their educational goals. Throughout the year, advisors participate in recruiting events presented by the Office of Admissions. These events may include both group presentations and individual consultations with students and parents. In addition, prospective students visit OSU throughout the year via the campus tour program. Often, these students and their parents set up individual appointments with advisors in their college of interest. Additionally, Ecampus houses an enrollment services team whose staff field questions and provides resources to those interested in completing their bachelor’s degree online.

**New Students:** New and transfer students attend an orientation program during the summer and just prior to fall quarter. START, the summer orientation program, includes an academic overview plenary session; a group presentation with advisors and other students in the student’s major college; an initial meeting with an advisor; and an introduction to OSU’s academic regulations, curricula and registration
system. For students who are unable to come to a START session, the advisors replicate the process during Welcome Week prior to the start of fall term. Students who start winter or spring term attend term orientation programming led by the orientation staff, advisors and campus partners. For online students, Ecampus provides distinct online orientations for degree-seeking undergraduate students, nondegree-seeking students and graduate students that covers a variety of topics specific to online and hybrid learners, as well as a tutorial on the services and resources available to Ecampus students.

**Current Students:** Students are encouraged to meet with their advisor in their assigned college/department each term and as needed. Ecampus students connect with their advisors through email, phone and video conferencing. Since fall 2014, freshmen have been required to meet with their academic advisors at least once per quarter using a common advising syllabus to guide content and sequencing of discussions with advisors. For sophomores and above students, colleges and departments determine the frequency and duration of mandatory appointments, such as every term or once a year. Advisors are encouraged to make proactive outreach efforts to assist students in meeting their academic goals and finding academic success.

**Academic Counseling as Supplementary Advising:** To supplement formal academic advising, OSU provides academic counseling to students who face special challenges in transitioning to college or encounter academic difficulties that require more focused, individualized attention. Academic counselors communicate with students proactively and often with a greater frequency than their advising counterparts. Academic counseling is provided through the Academics for Student-Athletes office, the College Assistance Migrant Program, Ecampus, the Educational Opportunities Program and TRIO/SSS. Students with disabilities are encouraged to consult regularly with Disability Access Services. The Office of International Services offers advising to international students on issues relating to their international status.

**Advising at Multiple Stages: Graduate Programs**

**Prospective Students:** The Graduate School maintains a central website with detailed information regarding every graduate program offered by OSU. Students are able to review the admissions requirements and contact information and link directly to the program’s website for both prospective and current students. Some programs host on-campus visits and informal meetings with applicants. In addition, the Graduate School participates in several nationwide graduate recruitment events. Additionally, Ecampus houses an enrollment services team whose staff field questions and provides resources to those interested in pursuing graduate degrees and certificates online.

**New Students:** The Graduate School has a well-developed communication plan with newly admitted students that begins the summer before they matriculate and continues throughout their tenure as graduate students. In addition to orientations conducted by students’ individual degree programs, the Graduate School offers GRAD 511: Designing a Path for Success. New OSU-Cascades graduate students participate in a major-specific new student orientation as well as a Graduate Resource Fair each summer as their new cohort begins.

**Current Students:** The Graduate School assists program faculty and staff in ongoing monitoring and mentoring of current students. Faculty members are notified on a quarterly basis of students who appear to be at risk academically. The Graduate School provides online mentoring modules for new graduate faculty. OSU-Cascades students also work directly with the major professor in their program. OSU-Cascades hosts a Grad Student Open House each spring in conjunction with Grad Student Appreciation Week, and current students can request professional development funds to attend relevant conferences from the OSU-Cascades Student Fee Committee.
Advising at Multiple Stages: Professional Programs

**Perspective Students:** The Doctor of Pharmacy program maintains a website with detailed information regarding the Pharm.D. program and application process. Students are able to review the admissions requirements and contact information and find information for both prospective and current students. The Pharm.D. program participates in on-campus visits, informal meetings and email correspondence with applicants. In addition, the Pharm.D. program participates in several regional recruitment events.

The Carlson College of Veterinary Medicine has an admissions coordinator who provides pre-veterinary student advising. This coordinator answers questions of incoming students, attends pre-veterinary recruiting events, organizes tours and events for prospective students and coordinates pre-veterinary club and scholar activities. In addition, a centralized website provides detailed information for both prospective and current students.

**New Students:** The Pharm.D. program has a well-developed communication plan with newly-admitted students that begins the spring and summer before they matriculate and continues throughout their tenure as graduate students. The Pharm.D. program uses a combination of email and Canvas to provide information to students. The Pharm.D. program has a required New to OSU orientation for all incoming students who have never taken classes at the Corvallis campus. All incoming Pharm.D. students are required to attend the two-day P1 Orientation.

Within the Carlson College of Veterinary Medicine, the admissions coordinator and student services coordinator organize all materials sent to incoming students and help to ease transition into professional school. Every year, incoming first year DVM students participate in three days of orientation prior to starting fall term. They also enroll in a Veterinary Medicine Orientation course during their first term of the professional program.

**Current Students:** The Office of Students Services within the College of Pharmacy provides centralized advising for all Pharm.D. students. Students are encouraged to see their advisor as needed but are required to meet with their advisor at least once a year for the first three years of the Pharm.D. program. Additionally, Student Services collaborates with faculty on early intervention advising. This allows advisors to require students who are underperforming on assessments (in a class or across the curriculum) to come in for a conversation. Advisors also provide programming on a variety of topics depending on the needs of the students.

DVM students receive advising by assigned faculty mentors, peer tutors, the associate dean for student and academic affairs, the student services coordinator and the student progress committee within the college.

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2.0.11 Cocurricular Activities

Cocurricular activities are consistent with the institution’s mission, core themes, programs and services and are governed appropriately.

Cocurricular activities are critical to meeting Oregon State University’s mission to produce globally competitive graduates. Embedded in our core themes is the objective of providing supportive and healthy learning environments beyond the classroom for student success and development at all levels. As part of the introduction to Standard 2D: Student Services, this report has provided an overview to the offices with primary oversight of student academic success services — faculty affairs, student affairs and the Graduate School — along with the multitude of programming offered to all students through academic colleges and units.

OSU offers a robust Student Experiences and Engagement (SEE) unit within the Division of Student Affairs. SEE’s mission is to create meaningful and diverse opportunities for leadership development and involvement experiences that cultivate positive social change, shaping a better self and a better world. Within SEE are four areas:

- **Craft Center** provides opportunities for students to engage their hearts and minds in the pursuit of self-discovery and self-expression.

- **Diversity and Cultural Engagement** works with students to build an inclusive, just community. Enriched by differences, these programs and initiatives empower students to develop multiple perspectives and foster self-awareness.

- **Orange Media Network** (OMN) includes a newspaper, TV station, radio station and three magazines. OMN provides innovative and hands-on leadership experiences that build grit, engage the community and challenge views.

- **Student Leadership and Involvement** serves as the heart of campus engagement, where students can find purpose and belonging through meaningful connections and active learning experiences. Though civic engagement and leadership opportunities, clubs and organizations, and other activities, students can discover their passions and build community.

Several student-coordinated programs offer additional opportunities for cocurricular engagement:

- **Community Dialogues**, formerly known as Team Liberation, promotes justice for humanity through dialogue, continuous learning and intentional experiences.

- The **Global Beavers Team (GBT)** leads in creating a community to enhance the student experience. GBT contributes to the development of an intentional and comprehensive student-led plan for cross-cultural interaction that supports and enhances the global diversity efforts at OSU.

- **OSU Program Council** is a student-run organization that plans and produces an array of diverse, high-quality and entertaining events that enhance student life and contribute to overall student development.
RESOURCES AND CAPACITY

- **The OSU-Cascades Office of Student Life** leads event programming for the campus through a variety of student-run clubs and organizations and partners with OSU-Cascades housing staff to reach both residential and commuter students.

The Graduate School, College of Pharmacy, and Carlson College of Veterinary Medicine each provide students with a diverse range of cocurricular activities consistent with OSU’s mission, core themes, and academic programs. Online students also have opportunities to participate in cocurricular activities.

Exhibits 2.D.11

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2.D.12 Auxiliary Services

If the institution operates auxiliary services (such as student housing, food service and bookstore), they support the institution’s mission, contribute to the intellectual climate of the campus community and enhance the quality of the learning environment. Students, faculty, staff, and administrators have opportunities for input regarding these services.

OSU’s auxiliary services support the mission of the university by contributing to the intellectual climate of the campus and enhancing the learning environment. These auxiliary services include residence halls, family housing apartments and dining centers, and services on the campus. Additionally, the OSU Beaver Store Inc. operates independently and is financially separate from the university.

University Housing and Dining Services

University Housing and Dining Services (UHDS) provides living-learning environments and contributes to the intellectual climate of the campus through its programs and services in residence halls, the family...
housing community and the dining centers. These are based on a strategic goal focused on student success and development. Examples include:

- Themed academic and social living-learning environments in the residence halls that are delivered in partnership with academic departments. Academic partners participate in and contribute to student success and residential programs in a variety of ways, including tutoring, educational programs, classes, workshops and faculty-in-residence. UHDS currently has partnerships with the colleges of Business, Engineering, Public Health and Human Sciences, and Science, along with the Honors College.

- Support for underrepresented student populations through internships for students from migrant families, as well as retreats and specific programs and services focused on particular groups and issues, which are open to all students.

- Academic success skills and educational programming.

- Safety and wellness programming designed to successfully transition students into college as well as prepare them for more independent off-campus living.

- Orientation and referral to campus support services by resident assistants, academic learning assistants and cultural relations facilitators.

- Diversity and social justice education for students and student staff. These include workshops, trainings, readings, webinars and selected conferences, including presentations and sessions by UHDS and OSU staff.

UHDS staff includes professionals with backgrounds in student development who provide personal support for students in their transition to college. They also support and advocate for a positive, welcoming and inclusive environment and community by enhancing, promoting and celebrating the uniqueness as well as the shared experiences of student residents and department staff.

Students have opportunities to provide input regarding UHDS services via the student-elected Residence Hall Association leadership and various living group meetings. UHDS also conducts comprehensive assessments. The results are used to inform strategic planning and goals, as well as to make continuous improvements in services and programs. The department’s assessment plan and subsequent report are conducted and produced at least annually and provided to unit leadership and others within the division as well as to the Student Affairs Assessment Council.

Faculty, staff and administrators also have opportunities for input through the University Housing Committee (comprising OSU staff as well as UHDS staff and students) and other forums. UHDS is accountable to the vice provost for student affairs for all operations, programs and services. UHDS staff and students are held accountable for maintaining professional and community standards, as well as upholding numerous policies and rules (published online and available in other formats as needed). UHDS works with staff and students who experience difficulty in meeting these standards to reengage in the community of staff and residential students.

UHDS also offers a housing and dining program at OSU-Cascades. Given the small size of the campus and the corresponding housing and dining program, UHDS offers similar residential and dining experiences in close collaboration with the Office of Student Life and the academic programs offered at OSU-Cascades. The main UHDS operation in Corvallis provides oversight, direction and support for housing and dining operations at OSU-Cascades.
RESOURCES AND CAPACITY

OSU Beaver Store

The OSU Beaver Store, OSU’s campus store for the past century, is financially and operationally independent from the university. A nonprofit member-based organization, the OSU Beaver Store returns excess revenues to students through a point-of-sale discount on course materials that is typically 8 percent. The organization is governed by an independent board of directors, including six elected students and three faculty or staff members.

The OSU Beaver Store operates several physical retail stores and a retail website to benefit its members and support OSU’s educational mission. Its campus retail location is a 50,000-square-foot facility that offers products to support academic coursework; promote the pride, spirit and traditions of the university; and provide convenience to the university community.

The OSU Beaver Store staff works closely with university faculty to provide their chosen course materials at the lowest possible prices. In addition to the member point-of-sale discount, the store provides cost-saving options including digital course materials, open educational resources, library reserves, rental textbooks and used textbooks.

For Ecampus and OSU-Cascades, students purchase books and most supplies online through the OSU Beaver Store. OSU-Cascades opened a Welcome and Visitor Center in 2018 that provides students, faculty and staff access to OSU-Cascades gear and some limited supplies.

Exhibits 2.D.12

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2.D.13 Intercollegiate Athletics

Intercollegiate athletic and other cocurricular programs (if offered) and related financial operations are consistent with the institution’s mission and conducted with appropriate institutional oversight. Admission requirements and procedures, academic standards, degree requirements, and financial aid awards for students participating in cocurricular programs are consistent with those for other students.

The Department of Intercollegiate Athletics focuses on the holistic growth of its student-athletes through academic and athletic excellence in a progressive and inclusive environment of mutual respect. The department unveiled a five-year strategic plan in February 2018, which includes six strategic goals consistent with OSU’s mission and core themes. Certified by the National Collegiate Athletic Association (NCAA), OSU participates in the NCAA Division I Bowl Championship Subdivision as a member of the Pac-12 Conference. The university sponsors 17...
varsity sports: baseball, men's and women's basketball, women's cross country, football, men's and women's golf, women's gymnastics, men's and women's rowing, men's and women's soccer, softball, women's swimming, women's track and field, women's volleyball and wrestling.

**Oversight**
The vice president and director of athletics is responsible for the management and fiscal operations of athletics and reports directly to the president of the university. The faculty athletics representative reports to the president, and the senior associate athletic director for compliance reports to both the president and the vice president and director of athletics. The department’s executive leadership team, all of whom report to the vice president and director of athletics, helps run the day-to-day operations of the department. The Athletics Advisory Committee, appointed by the president and composed of faculty, students and alumni, meets regularly to advise the vice president and director of athletics regarding general policy. The director of athletics works closely with the Office of General Counsel for legal and compliance advising. The close partnership between these offices is not typical nationwide and is a benefit to OSU.

**Financial Operations**
The vice president and director of athletics, with assistance from the associate athletic director/chief financial officer, is responsible for the fiscal operations of the athletics department. They meet with the president of the university and the vice president for finance and administration on a quarterly basis. The department is subject to the NCAA Financial Agreed Upon Procedures each fiscal year, and internal random audits are conducted. The Auxiliaries and Activities Business Center, which also services University Housing and Dining Services (UHDS), Recreational Sports, Public Safety, Memorial Union, Facilities Services and Counseling and Psychological Services (CAPS), is the primary support unit for business operations for Intercollegiate Athletics.

**Admissions Requirements and Procedures**
The admissions policies and requirements are the same of all students. For student-athletes, the Department of Intercollegiate Athletics notifies the Office of Admissions of prospects. When these students submit their applications, the Office of Admissions codes these applications as “athletic interest.” Like all OSU students, student-athletes must complete an application and provide all supporting documentation to the same standards as other applicants. The Office of Admissions reviews and approves or denies student-athlete applications. All students who meet the published admission criteria are admitted.

Because of the institutional benefits derived from maintaining a successful athletics program, the university provides an admissions appeal process through the Athletic Admissions Committee to a small number of student-athletes who do not meet the requirements. The Office of Admissions collects test scores, transcripts and other required application materials. The Athletic Compliance Office collects recommendations and other relevant materials, adds them to the applicant’s admission file, and then presents the completed file to the Athletic Admissions Committee. Committee members use this information, as well as knowledge of support organizations on campus, to decide on the applicant’s ability to become a successful student at OSU. For student-athletes admitted through this process, the committee may require the student to participate in specific academic support programs and/or postpone athletic competition until her/his sophomore year. The director of academics for student-athletes can make recommendations for any special series or requirements for each case.
Academic Standards and Degree Standards

Oversight of academic standards and degree requirements is the purview of the faculty governance outside of the Department of Intercollegiate Athletics. Student athletes are subject to the same academic standards and degree requirements as for all students at OSU. As part of the academic regulations of the university, the undergraduate academic standing rules are applicable to all students.3

Financial Aid Awards for Student-Athletes

Oversight for all financial aid awards, including athletics-related aid, rests with the Office of Financial Aid4 Athletics grants-in-aid may cover up to the cost of attendance (according to the regulations set forth by the NCAA and the U.S. Department of Education). If a student-athlete does not receive a full cost of attendance grant-in-aid, they may receive other types of financial aid up to the full cost of attendance. The assistant director for compliance in financial aid, in the Office of Financial Aid, coordinates this oversight. All renewals, cancellations and new awards are processed in the Office of Financial Aid. The director of financial aid or designee has signature authority on all awards. The Office of Compliance coordinates with the Office of Financial Aid on all financial aid matters and assists with communication with coaches and student-athletes.

Exhibits 2.D.13

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2.0.14 Identity Verification and Distance Education Courses and Programs

The institution maintains an effective identity verification process for students enrolled in distance education courses and programs to establish that the student enrolled in the distance education course or program is the same person whose achievements are evaluated and credentialed. The institution ensures the identity verification process for distance education students protects student privacy and that students are informed in writing, at the time of enrollment, of current and projected charges associated with the identity verification process.

Ecampus uses the same systems and mechanisms employed by the main campus to assure student identity at enrollment.1 Ecampus online courses are administered through Canvas, an enterprise-wide learning management system. For students to gain access to Ecampus courses, they must register for and use their OSU Network Identification (ONID) account for authentication. Students are informed of ONID account access and use as a part of the online new student orientation, completion of which is required of all newly admitted students.2 Students also receive a Getting Started email informing them of course access and administrative policies and processes, including any changes. This same information is easily available on the Ecampus website.3 As with OSU as a whole, Ecampus instruction, as
well as administrative transactions involving student information or communications, abides by FERPA regulations and protections.

Should an Ecampus course require proctoring of examinations, test takers are required to produce photo identification, such as a driver’s license, to validate their identity before sitting for the exam. If the exam is online, students must log in to Canvas using their ONID account to gain access to the test. Proctors are either employees of the university for examinations that are administered on campus or, if the exam is off campus, thoroughly vetted through an Ecampus-managed approval process that includes instructor approval in special cases. Proctors are provided clear instructions regarding their expected responsibilities as a proctor and the nature of the testing environment. Proctors are also informed of FERPA regulations related to student privacy.

Although Ecampus’ current measures to ensure student identity verification for online courses meet U.S. federal rules and regulations, Ecampus continues to investigate more robust solutions to enhance online course security and identity verification. Such upgrades will be implemented as they become available and are deemed appropriate. Ecampus is exploring a student authentication tool that uses a webcam and facial recognition to authenticate students at various access points within Canvas. Lastly, OSU is in the initial phase of implementing a two-factor authentication process to provide additional security to ONID accounts.

Exhibits 2.D.14

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**2.E LIBRARY AND INFORMATION RESOURCES**

**2.E.1 Library Holdings are Consistent with and Support Mission and Core Themes**

Consistent with its mission and core themes, the institution holds or provides access to library and information resources with an appropriate level of currency, depth and breadth to support the institution’s mission, core themes, programs and services, wherever offered and however delivered.

Oregon State University Libraries and Press (OSULP) holds and provides access to library and information resources with appropriate levels of currency, depth and breadth to support the mission, core themes, programs and services across all delivery modes. OSULP’s work is rooted in the commitment to openness, inclusion and diversity. OSULP advances OSU’s mission by contributing to learner success, scholarly excellence and community engagement, and by respectful and proactive stewardship.

OREGON STATE UNIVERSITY
RESOURCES AND CAPACITY

OSU Libraries and Press
OSULP represents the second-largest research library in Oregon with these co-locations: The Valley Library at the main campus in Corvallis and the Marilyn Potts Guin Library at the Mark O. Hatfield Marine Science Center in Newport. Renovated and expanded in 1999, the Valley Library encompasses 336,000 square feet. Its collection includes materials in all subject areas, including nearly 1.5 million physical items. The library operates with 31 tenure-track faculty, 27 professional faculty, 41 classified staff and about 32 student workers. There are three endowed faculty positions: the Donald and Delpha Campbell University Librarian, the Gray Family Chair for Innovative Library Services and the McEdward Professor for Undergraduate Learning Initiatives.

The Valley Library provides a flexible learning environment that supports collaborative and engaged learning. Two important learning spaces are the Learning Commons and Undergraduate Writing and Research Studio. The Learning Commons offers a variety of spaces for groups to collaborate, as well as 118 computers (both Windows PCs and iMacs) that give students access to a wide variety of software. The Undergraduate Research and Writing Studio is a collaborative project between the OSU Writing Center and OSULP. Launched in fall 2018, the center provides a space where undergraduates get research and writing help from Writing Center peer tutors, writing faculty and OSULP librarians. Another learning space on the third floor supports tutoring for science and math.

The Marilyn Potts Guin Library houses the research and teaching collection that supports the Hatfield Marine Science Center. The Guin Library’s collection of more than 35,000 books and journals covers a broad range of marine-related topics, including fisheries, aquaculture, oceanography, geology, environmental studies and biology.

Two additional libraries support OSU students and researchers: the OSU-Cascades Library housed in Tykeson Hall on the Bend campus, and the McDowell Veterinary Medicine Library at the Carlson College of Veterinary Medicine on the Corvallis campus. While OSULP does not have direct administrative oversight for these libraries, it supports OSU students and researchers through coordinated licensing and purchasing of electronic resources as well as centralized acquisitions, cataloging and other technical services.

Since June 2007, the OSU Press has been a department within the OSU Libraries. The OSU Press supports the university’s strategic plan through its publication of scholarly and general-interest books on the intellectual, cultural, social and natural history of Oregon and the Pacific Northwest.

Collections and Resources
As of 2018, the libraries provide access to 150 databases and more than 85,000 unique electronic journal titles. There were nearly three million searches of the libraries’ electronic databases. In addition to databases and e-journals, OSULP regularly add electronic books to the collection. Since 2012, the libraries’ e-book collection has grown from approximately 51,369 electronic books to more than 600,000. OSULP’s Government Information and Maps Collection offers a wide array of U.S. and Oregon documents and maps. The Special Collections and Archives Research Center supports faculty and student research through its extensive collections of records, manuscripts and photographs pertaining to the history of OSU as well as a number of archival and book collections, most of which focus on the history of 20th-century science and technology. ScholarsArchive@OSU is OSU’s publicly accessible digital repository for research, scholarship and historical records. Any member of the OSU community can contribute content to ScholarsArchive@OSU.
Budget
The OSU Libraries base budget for Fiscal Year 2018 was approximately $14.5 million in Education and General funds. In FY18, 39 percent was allocated for library collections, 55 percent for salaries and benefits, and approximately 6 percent for supplies and services. These percentages have been consistent since FY14. Two additional self-supporting indexes provide approximately $573,000 annually to support operations for OSU Press and for printing and copying, respectively. OSULP expends nearly $500,000 annually from available gift funds to support personnel, collections and other needs such as technology, space and furniture (Document B).

In FY16 and FY17, the university administration made incremental increases to OSULP’s F&A (indirect cost recovery) allotment. These amounts equaled $450,000 and $600,000, respectively, with $450,000 added to the collections budget in 2016, and $400,000 in FY17 to offset inflation and subscription costs. The remaining $200,000 was used to address personnel needs, focusing on salary compression among library faculty. This support plus available carryover from the previous fiscal year has allowed OSULP to avoid significant reductions in collections. However, persistent serial inflation, averaging 5 to 7 percent, continues to restrain OSULP’s collection-building ambitions, preventing OSULP from adding new content on a recurring basis, especially research journals.

Memberships
Consortia memberships and partnerships increase access to resources for OSU faculty and students in a timely and efficient manner. In addition, OSULP shares faculty librarian expertise with other institutions of higher education. Memberships include:

- The Orbis Cascade Alliance, an academic library consortium with 39 members from Oregon, Washington and Idaho
- The Greater Western Library Alliance, a consortium of 38 research libraries across 18 states
- Archives West, a consortium of 48 archives and special collections in Oregon, Washington, Idaho, Montana, Utah and Alaska
- The Center for Research Libraries
- Western Regional Storage Trust (WEST)
- Coalition for Network Information
- Council on Library and Information Resources
- Scholarly Publishing and Academic Resources Coalition
- MetaArchive

In addition to regional and national memberships, OSULP works with campus partners and other institutions of higher education in Oregon on specific projects. OSULP partners with the OSU Institute for Natural Resources on Oregon Explorer, a comprehensive, natural resources digital library that provides easy and rapid access to reliable, up-to-date information about the state's natural resources. A highlight of successful collaborations with the University of Oregon is Oregon Digital, which provides integrated online access to digitized materials from both research libraries.
Exhibits 2.E.1

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2.E.2 Planning for Library and Information Resources

Planning for library and information resources is guided by data that include feedback from affected users and appropriate library and information resources, faculty, staff and administrators.

OSULP uses a wide variety of data sources to inform planning and decision-making, including surveys, focus groups, interviews, observational studies and analytics. Research conducted by OSULP's faculty is closely aligned with Oregon State and OSULP's strategic goals and initiatives and illustrates the libraries' strong commitment to critically analyzing, assessing and improving practice.

The OSULP 2012-17 Strategic Plan called for the organization to build its capacity to analyze and use evidence, and to make that evidence transparent to users. That strategic planning process was grounded in feedback and information from the communities OSULP serves. To support the strategic planning process, OSULP conducted a robust needs analysis that involved stakeholders, including students, faculty, staff, community members and professional partners. In 2017-18, OSULP developed and launched a new strategic plan, using the same inclusive principles and practices.1

OSULP's varied user communities have structured opportunities to provide input on library services, collections and spaces:

- **Faculty Senate Library Committee** provides advice and input on issues of importance, including support for teaching and learning, scholarly communication, library policies and development of resources to support instruction and research.2

- **Committee representation:** OSULP has permanent seats on several key university committees including: Faculty Senate Curriculum Council; Faculty Senate Online Education Committee; University Assessment Council; Undergraduate Education Council; Information Technology Coordination Committee; Outreach and Engagement Council; and Associate Deans of Research Advisory Council.

- **Liaison Librarians** serve as a crucial point of communication with OSU’s academic colleges, and there are also librarians with liaison FTE dedicated to building relationships with the Division of Student
Affairs, the First-Year Experience, International Affairs, Ecampus and OSU’s five cultural centers.

OSULP uses a combination of quantitative metrics and qualitative data to measure progress, assess user needs and identify areas for improvement in practice. Data from these sources is used annually to make decisions about staffing, loan periods, fees, service hours and more.

- **Quantitative** data are drawn from: usage data, gate counts, surveys, web analytics, ALMA (integrated library system) analytics and space utilization surveys.
- **Qualitative** data is gathered using focus groups, interviews, observations and targeted analysis of questions asked at the Info Desk and Concierge stations.
- **Leveraging partnerships:** Wherever possible, OSULP builds library assessment into broad campus evaluations of teaching and learning, research productivity and the campus experience. Library-focused questions were embedded into assessments conducted by Ecampus, Academic Achievement and Business Affairs. The Library Cost Analysis study as a component of OSU's Facilities and Administrative Rate Proposal has allowed OSULP to more accurately identify library resources that support sponsored research, resulting in a significantly higher return than alternative methodologies (such as standard FTE analysis) would yield.
- **Surveys:** To measure success and identify places for improvement, OSULP gathers information using a variety of survey instruments: LibQual+ (2003, 2011, 2018); an adapted version of the University of Washington’s Triennial Survey (2019); and an adapted version of the University of Nevada-Las Vegas Libraries’ Workplace Climate (2016). OSULP will continue to administer these surveys on a three-year cycle.
- **Usage metrics:** Librarians across all departments at the Valley, McDowell and Guin libraries use LibAnalytics to record workshops, instruction sessions, consultations, tours and orientations. LibAnswers is used to gather questions and answers from public services desks. Circulation counts, including fines, borrowing and lending, are collected using Alma Analytics. Lending, borrowing and document delivery statistics are retrieved from ILLiad. These statistics inform decisions about staffing and resource allocation, and OSULP reports this data to national bodies, such as the Association of College and Research Libraries and the National Center for Education Statistics.
- **Collection assessment:** A patron-driven acquisitions model provides users with an opportunity to provide direct input on acquisitions decisions. Notably, OSULP has built in proactive elements to this model by embedding an opportunity for users to request purchases directly from the interlibrary loan form. The libraries’ Collections Council actively reviews renewal decisions using a variety of data including: cost-per-use data adjusted for disciplinary and program differences; input from liaison librarians and researchers about impact; and changes in use over time.

OSU faculty librarians hold tenure-track appointments and have FTE dedicated to teaching and to scholarship derived directly from their primary assignment. Assessment is included in position descriptions for all faculty librarians and for all faculty positions with management/supervisory responsibilities. Much of the actionable data that supports planning, decision-making and program improvement is developed at this level.

- **OSULP librarians** combine these statistics with targeted inquiry using a variety of quantitative and qualitative methods. On issues of significant importance, users are invited into the decision-making process using focus groups, interviews and structured conversations.³
OSULP faculty librarians routinely conduct in-depth studies to understand the information-seeking behavior and practices of researchers at OSU.\textsuperscript{4, 5, 6, 7}

OSULP librarians also engage in collaborative research with colleagues around the country and around the world, supporting efforts to establish common benchmarks and best practices.\textsuperscript{8, 9}

OSULP uses a robust design process to inform decisions about library spaces. At the macro level, space utilization surveys are conducted every three to five years, using floor maps, collections analyses and observations (Document A). OSULP is shifting to SUMA, an online tool developed at the North Carolina State University Libraries to do more in-depth space analyses, examining furniture use and user behaviors in targeted areas (Document B). Library faculty use a combination of qualitative and quantitative measures to design learning spaces that are responsive and flexible, including observational studies, usage metrics, instruction trends, analysis of teaching evaluations, interviews, journey mapping and pop-up whiteboard surveys. OSULP applies these evidence and design practices to service design and uses pilot projects as a way to quickly prototype, test and improve services\textsuperscript{10} (Documents C and D). OSULP is working to identify the necessary documents, reports and datasets to create a historical statistical archive. Access to such an archive will improve cross-departmental collaboration and information sharing and assist in the organization’s future planning, decision-making and budget preparation.

Exhibits 2.E.2

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<td>OSU Graduate Students’ Scholarly Landscape and Institutional Repository Needs (Willi Hooper and Zhang)</td>
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2.E.3 Library and Information Resources Training and Support

Consistent with its mission and core themes, the institution provides appropriate instruction and support for students, faculty, staff, administrators and others (as appropriate) to enhance their efficiency and effectiveness in obtaining, evaluating and using library and information resources that support its programs and services, wherever offered and however delivered.

Oregon State University’s Strategic Plan 2014-18 (SP3.0) charges the university community to “provide a transformative educational experience for all learners” and targets “leadership that integrates scholarship, creativity and collaboration throughout learning and discovery.” OSULP’s teaching and learning programs are deeply invested in these goals. Teaching librarians and archivists collaborate to provide, support and facilitate transformative learning experiences in library classrooms and learning spaces. The OSULP teaching program is committed to “making the library useful and usable.”

OSULP has built a robust instruction program sustained by key campus partnerships. In the last 10 years, the program has undergone some important changes to allow teaching librarians and archivists to better meet the needs of the campus community, and to respond to changes in the information landscape. The focus of the program has shifted from navigating library systems and collections to finding and using information in whatever form it takes, wherever it is located. Teaching at OSULP now addresses three essential literacies that support both classroom success and researcher productivity: information literacy, data literacy and primary source literacy. To expand efforts beyond information literacy, teaching librarians and archivists have become more strategic and intentional, building new partnerships and, where appropriate, shifting the means by which instruction is delivered. OSULP’s teaching program aligns with the campus goal to “move beyond one-size-fits-all learning” by tailoring different approaches to different audiences, and by providing the OSU community with a variety of different ways to get support and help with research and inquiry.

Key Components

Librarians are invested in creating transformative learning experiences that integrate scholarship, collaboration and creativity throughout learning and discovery. Key program components include:

- **Credit courses.** Librarians collaborate with high-impact programs across campus to create courses that allow students to examine information issues deeply, using engaging pedagogies and a focus on inquiry.

- **Internships.** OSU’s Vision 2030 statement promises that “we engage students as collaborators in experiential learning and discovery.” OSULP offers the opportunity for students from a wide variety of disciplines to apply their knowledge and expertise in real-world settings in two ways: 1) Faculty librarians and archivists use LIB 410 to deliver for-credit internships; and 2) the OSULP Student Internship Program Endowment Fund supports paid internships.

- **Course-Integrated and Embedded Instruction.** Teaching librarians and archivists collaborate with faculty to tailor instruction to the experiences in particular courses. While these sometimes take the form of standard overviews to library resources and tools, OSULP faculty seek out opportunities to collaborate more deeply with courses and programs serving historically underrepresented students, international students and distance learners.

To enable these strategic projects, OSULP has had to find more efficient and effective ways to deliver basic instruction once provided primarily in guest lectures.
RESOURCES AND CAPACITY

Peer-to-Peer Learning and Communities of Practice
- **Undergrad Research and Writing Studio (URWS).** OSULP partners with the Writing Center in this innovative library learning space where students get help with academic research writing at the point of need.

- **EdTech Workshops** (in development). A new service point will feature peer-led pop-up workshops to help students struggling with the technology skills to successfully complete papers, projects and homework.

- **Data/Software/Library Carpentries.** In partnership with OSU Information Services and OSU's Center for Genome Research and Biocomputing, faculty librarians are training a body of faculty and staff at OSU as Software and Data Carpentry instructors.

- **Teach the Teacher.** In 2013, faculty from OSULP and the School of Writing, Literature and Film launched a teach-the-teacher model to more effectively embed information literacy outcomes into first-year composition sections.

Workshops
- **Faculty/Graduate Workshop Series.** Since 2007, faculty librarians and archivists have delivered a variety of popular workshops, twice per term, throughout the academic year.

- **Workshops on Demand.** The Teaching and Engagement Department promotes Workshops on Demand to instructors who want everyone in their course to attend a particular offering.

Research Guides
OSULP uses the LibGuides platform to create, deliver and maintain research guides. Teaching librarians track usage data to make decisions about the organization and use of research guides. Popular guides include: Scholarly Articles: How can I Tell?, Research Data Services; Ecampus Library Services, Zotero, 3D Printing, Research Study Referenced in a Popular Journal and Academic Integrity for Students.

Program Scope
In the Valley Library, 23 librarians and archivists, representing every OSULP department, provide instruction. The director of the Guin Library teaches course-integrated sessions and stand-alone workshops, as well as designs instructional programming at Guin and at the McDowell Veterinary Medicine Library. There is also a long-standing library instruction tradition at OSU-Cascades managed separately from the rest of the libraries' instructional efforts. All teaching librarians and archivists hold faculty positions: assistant/associate professor, instructor or senior faculty research assistant.

Partnerships with faculty and other campus programs that are essential for success include:
- Writing Intensive Curriculum Program
- Academic Achievement
- Honors College
- INTO OSU
- First-Year Experience
- University Cultural Centers
Scholarship and Assessment of Teaching

Teaching evaluations are built into the promotion and tenure process. Library faculty appoint a peer review of teaching coordinator to manage peer evaluations of teaching effectiveness. Faculty can request evaluations at any time, and they are required in the third and fifth year for tenure-track faculty. The process is both formative and summative (Document A).

Teaching faculty applying for tenure also undergo a student evaluation of teaching. Library faculty position descriptions define teaching audiences, which vary depending on the focus of the primary assignment. Letters are solicited from individuals who represent the defined audiences, and those are summarized into a composite letter by a student committee. The composite letter is included in the faculty dossier (Document B).

For course-integrated and workshop sessions, end-of-session evaluations are captured using Qualtrics. End-of-session data is captured using LibAnalytics and shared with professional associations like the National Center for Education Statistics and the Association of College and Research Libraries. For the workshop series, the graduate student services coordinator uses registration information to inform scheduling and frequency of workshops and to advise faculty on the timing and content of new workshop ideas. Faculty librarians supplement these data with formative and summative information gathered using classroom assessment techniques, and this information is used for teaching improvement. In-depth assessment is conducted to improve specific courses, particularly those tied to strategic partnerships.

Library faculty pursue research closely tied to their primary assignments, and teaching librarians and archivists conduct and share research related to teaching and learning. Library faculty have an outstanding record of professional contribution in this area.

Library faculty are committed to professional development to improve teaching. In the last 10 years, teaching librarians and archivists have received funding to bring national experts on topics like authentic assessment and program evaluation to OSULP. Every year, the libraries’ Teaching and Engagement Department sponsors a day-long professional development event entirely focused on teaching and learning. Brown bag sessions and webinars are supported throughout the year. In addition, faculty members receive support to attend and present at national and international conferences focused on the broad range of topics relevant to quality library instruction. Topics include pedagogy, high impact practices, diversity and inclusion, the student experience, educational technology, open educational resources, library space design and assessment.

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<td>End-of-Session Evaluation Form</td>
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2.E.4 Regular and Systematic Review of Library Information Resources

The institution regularly and systemically evaluates the quality, adequacy, utilization and security of library and information resources and services, including those provided through cooperative arrangements, wherever offered and however delivered.

At OSULP, assessment is built into practice in all library departments, and most library faculty have position duties dedicated to assessment and gathering user input as a component of their position descriptions. Two librarians hold positions focused on assessment: The assessment librarian, who coordinates library-wide assessment projects and provides expertise in quantitative analysis, and the collections assessment librarian.

Personnel

OSULP conducts a robust annual evaluation process each year. Faculty and professional faculty performance evaluations include self-reflection on the past year’s performance as well as supervisor and peer input. Faculty and staff work with their supervisors to develop annual goals that align with OSULP’s mission and that support the university’s mission.

Financial Planning

Each year between January and February, OSULP participates in a campuswide, strategic financial planning process to demonstrate how funds allocated to the libraries and press align with the university’s strategic mission and demonstrate OSULP’s strategic initiatives (Document A).
Collections

OSULP provides resources and both physical and virtual collections that support curriculum and align with OSU's colleges and academic programs. OSULP has faculty liaisons to OSU colleges and departments, though not a traditional subject specialist model for taking suggestions on building on collections. The libraries' collection development policy focuses on providing users with what they need at their point of need. The Resource Acquisition and Sharing Department provides robust interlibrary loan services, manages extensive collections of online journals, and offers scan-and-deliver services for articles from print journals in OSU's collections. The libraries encourage OSU's researchers and learners to suggest purchases directly and indirectly through demand-driven e-book and streaming video programs and through online purchase request forms.

OSULP’s collections are routinely assessed on an annual basis using metrics such as cost per use, average subject cost per use and faculty FTE to maintain collections that meet user needs. As mentioned in section 2.E.1, the OSULP collections budget has remained relatively flat (Document A), and it is an ongoing challenge to add new material without sacrificing currently useful content. Library users provide input about adding content to collections through the libraries’ patron-driven acquisitions program and the online library purchase form. The director of the Resource Acquisition and Sharing Department works with the Collection Coordinating Council, which is composed of library faculty in addition to the director of the Guin Library. The collection assessment librarian and acquisitions staff coordinate collection building, management and assessment. Library faculty liaisons work with OSU colleges to gather input about library collections, and the Faculty Senate Library Committee also provides input on collection holdings.

Print Collection Assessment

Over the past two years, OSULP has been pursuing in-depth analysis of print collections to create student-centered space in the libraries and identify material to move to an off-site storage facility. As OSU seeks to relocate the libraries' existing off-site storage space, it is an ideal time to examine collections overall (Document A). To review the monograph collection, the libraries will be using OCLC’s sustainable collections services, specifically the Greenglass collection analysis tool, to inform a phased collection deselection plan. Beginning in 2018, the focus has been on print journal collections. As a member of the Western Regional Storage Trust (WEST) since 2011, OSULP actively participates in the collaborative activities of this distributed print journal repository, and that participation allows the libraries to make informed decisions regarding access to, and preservation of, print journal titles.

Curriculum Support

To ensure that new and existing programs are adequately supported, an OSULP faculty member serves as an ex-officio member of the Faculty Senate Curriculum Committee. The collections assessment librarian reviews Category I and II proposals and provides input on current collections and collections needed to support new programs (Document B). When the libraries identify the need for additional funding, this need is noted. Then in the following fiscal year, the requisite amount of funding is allocated to the libraries to support the new program. Because several university programs require accreditation by their professional organizations, OSULP supports those colleges and programs that require library data as a part of their unique accreditation standards.

Consortia, Partnerships and Collaboration

OSULP participates in academic library consortia and actively pursues other partnerships and collaborations. The libraries assess and keep up to date with resource changes from these relationships to assess the value added to the OSU student and researcher community.
Information Technology

The Office of Information Security (OIS) works closely with OSULP e-resources staff to identify and stem attacks from robots and spiders, as well as help shut down instances of excessive downloading of content licensed from external vendors. The libraries depend on the quick response of OIS to ensure that access to journal article and database content continues.

OSULP has representatives on the Information Technology Coordination Committee, composed of IT leaders from across campus, and on the Departmental Computer Administrators, composed of computer lab technicians. Through these formal committees and many informal channels, OSULP has strong working relationships with the Division of Information and Technology.

Exhibits 2.E.4

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2.F FINANCIAL RESOURCES

2.F.1 Financial Stability, Sufficient Cash Flow and Reserves

The institution demonstrates financial stability with sufficient cash flow and reserves to support its programs and services. Financial planning reflects available funds, realistic development of financial resources and appropriate risk management to ensure short-term solvency and anticipate long-term obligations, including payment of future liabilities.

Financial Stability

OSU documents and reviews its financial planning regularly. The university is required to document its fiscal position annually, including reserves, risks, debt obligations and funding breadth through independently audited financial statements. The OSU Board of Trustees reviews and approves annual operating and major capital budgets. The board has established a number of practices and measures to assess the financial position of the university, including the following:

- In March 2015, the board approved 10 financial, facilities and space metrics to track operations and to complement the strategic indicators of the university’s Strategic Plan. Staff maintain current values for each of these metrics and update them annually or as appropriate.
- The university prepares an annual operating budget and monitors actual results compared to budget throughout the year. The actuals-to-budget are provided to the board in quarterly management reports. The university maintains a 10-Year Business Forecast, which is updated for the board every January of even-numbered years.
- In 2014, the board adopted treasury policies, including certain policies related to the use of debt. The debt policy formalizes the link between the university’s strategic plan and the issuance of debt, recognizing that debt is a limited resource that must be managed strategically to best support the university’s priorities. The debt policy includes five metrics that have been established to monitor debt capacity and affordability: viability ratio, primary reserve ratio, debt burden ratio, debt service
The university has issued general revenue bonds and, in 2017, entered into a General Revenue Note (the Note) in the form of a revolving line of credit. The university may draw up to a maximum amount of $50 million on the Note. The Note has an initial term of three years and is expected to be renewed or replaced at the end of the initial term. In September 2017, Moody’s maintained the Aa3 rating for OSU’s general revenue bonds with a stable outlook.

- The university has established an internal bank, guided by an Internal Bank Policy and a Liquidity Management Policy adopted by the board in 2014 and 2017. The internal bank integrates the three primary functions of treasury management: 1) cash management; 2) limited term investment management (i.e., management of non-endowment assets); and 3) debt management (both short- and long-term). The internal bank manages the issuance of external debt such as issuing long-term bonds or utilizing short-term instruments. The internal bank uses these proceeds to provide internal loans to the individual units of the university.

OSU's financial position has shifted to be increasingly dependent on tuition revenues, as is the case for many public universities. State funding for higher education has a somewhat volatile history. Between 1999-2001 and 2011-13, inflation-adjusted state funding per student FTE declined 46 percent. However, total funding for 2015-17 saw a 27.5 percent increase over 2013-15. While funding per student FTE has increased 59 percent since 2011-13, it is still less funding, adjusted for inflation, than in 1999. Long-term pressures on state resources from health care and retirement obligations diminish the likelihood of this trajectory continuing into 2019-21 and beyond.

Financial Planning
The university does both short-term (annual and biennial) and long-term (10-year) financial planning. The university has used FuturePerfect, a strategic planning tool, to measure the impact of its operations, capital expenditures, debt financings and growth opportunities over a 10-year horizon. This process reflects the integrated financial impact on the university as a whole and identifies which areas need to be actively managed in order to lead the university forward prudently with its new financial opportunities and challenges. The university will fully transition its strategic planning model to Whitebirch software, which provides a more robust platform, effective Jan. 1, 2019.

The university has developed a 10-Year Capital Forecast as an instrument for long- and short-range planning for physical development, operations and finance, as well as planning for all academic, research and other activities that take place in its facilities around the state. An Infrastructure Work Group (IWG) was charged by the provost to review, evaluate and prioritize capital projects for incorporation into the forecast. The forecast will be evaluated annually to ensure that it reflects institutional priorities and responds to opportunities and change. The 10-Year Capital Forecast is guided by high-level goals for enrollment and staffing to determine capital needs. Projects included in the capital forecast will be considered in light of their impact on the university’s strategic plan and on its projected financial condition before being approved.

Exhibits 2.F.1

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### 2. F. 2 Resource Planning and Development

Resource planning and development include realistic budgeting, enrollment management and responsible projections of grants, donations and other non-tuition revenue sources.

The university has a robust process for planning and developing annual all-funds budgets. OSU recently adopted a productivity-based budget model for the Corvallis Education and General Budget to help direct budget planning for the academic colleges. OSU-Cascades has been using a productivity-based budget model for the OSU-Cascades Education and General Fund budgets.

The Office of Budget and Fiscal Planning develops an annual budget forecast for the next fiscal year each fall term. This includes enrollment projection, assumptions about inflationary costs, capital planning from the 10-year business forecast and known major commitments from the provost and vice president for Finance and Administration. The budget office works with the enrollment management multi-year enrollment projection plan. The plan includes projections for resident students, nonresident students, international enrollments and the mix of undergraduate and graduate students. The university’s recent priority has been to focus on increasing nonresident enrollment while providing access to qualified Oregonians, consistent with its land grant mission. The OSU-Cascades priority has been to increase community college transfer and Central Oregon first-year student enrollment. The enrollment projections include the Corvallis and Bend campuses, as well as the university’s online programs.

Through the fall and early winter, the University Budget Committee with advice from the Student Budget Advisory Council and the Division of Enrollment Management, develop recommendations for tuition rates for the provost and president to be considered for approval by the Board of Trustees at its spring meeting. Budget reviews are held January through March with each major academic college and support unit and at OSU-Cascades, and preliminary budgets are issued in April or May. The Office of Budget and Fiscal Planning works with business units to review revenue and expense projections through the fiscal year end and prepares quarterly financial analyses for the board.
Annual budget plans for major auxiliaries are developed and approved with monthly and quarterly oversight with reporting provided by a fiscal manager. Smaller auxiliaries, designated operations and service departments' budgets are also developed, approved and reviewed as part of the budget planning process with the department or college responsible for the activity. The budget office reviews historical trends of revenues and expenditures for these units to confirm the budget projections.

Restricted funds (external grants and contracts, governmental financial aid and gift funds, including those from the OSU Foundation) are projected for revenues and expenses based on historical trends. Grants and contracts expenditures are projected annually from an ongoing assessment of the number of grants submitted and awards received. These are reviewed quarterly as part of ongoing management reports for the board.

The Office of Budget and Fiscal Planning also conducts a set of monthly budget conversations to answer questions about the budget and to share information about various components of the university's budget with the larger OSU Corvallis community, while the OSU-Cascades budget office shares budget information in Bend.6

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2.F.3 Financial Planning and Budget Development

The institution clearly defines and follows its policies, guidelines and processes for financial planning and budget development that include appropriate opportunities for participation by its constituencies.

Since the last accreditation, Oregon State University has transitioned to an independent governing board. Annual financial planning and budget development will proceed as outlined below, with the final version of the annual budget reviewed by the president and approved by the OSU Board of Trustees.1

The responsibility for initiating development of the biennial state budget is that of the Office of Budget and Fiscal Planning, which coordinates the university’s Education and General (E&G) funds budget and other fund budgets in consultation with the provost and executive vice president and the vice president for finance and administration. Each year, a baseline draft budget is developed following a financial analysis of current and prior years’ data, which is used as the basis for discussion by the committees and leadership engaged in budget and tuition planning. Budget plans go through multiple iterations as enrollments materialize and planning assumptions evolve. A draft of the OSU-Cascades budget for E&G funds is developed by the OSU-Cascades associate vice president of finance and vice president.
OSU has implemented a shared-responsibility budget model for the E&G budget in Corvallis, which is a hybrid responsibility-centered management model that encourages collaborative decisions, investments in services and academic programs, and cross-unit collaboration. The model allocates budgets for four major functional areas: 1) academic program delivery; 2) academic support and institutional outcomes; 3) financial stability and commitments; and 4) strategic change and leadership. OSU-Cascades has implemented a similar hybrid responsibility-centered management model in Bend.

The University Budget Committee provides advice on key elements of the budget planning process, including recommendations for tuition rates. The Corvallis Student Budget Advisory Council and OSU-Cascades ASCC provides advice and recommendations to the University Budget Committee. The Provost’s Council of Deans, Provost’s Senior Leadership Team and Executive Committee and the Faculty Senate Executive Committee provide input and are apprised of budget projections and key changes. Other groups on campus, including the Faculty Senate, receive regular updates. All academic colleges make annual budget presentations to the Provost’s Senior Leadership Team, and major support units provide annual financial plans as part of the budget planning process. The budget plans and summary unit information are forwarded to the provost and the vice president for finance and administration, who review and prioritize funding decisions in alignment with the strategic plan and projected resources. The final version of the budget goes to the president for review and approval and is then forwarded to the Board of Trustees for consideration during the late spring (May or June) meeting.

The biennial state budget development process is coordinated by staff in the Office of Budget and Fiscal Planning in consultation with the provost and vice president for finance and administration. Oregon’s seven public universities prepare a combined request to the Higher Education Coordinating Commission (HECC), which establishes the universities’ requests for state funding for operating and capital support. Unlike the operating budget, the capital construction budget has a three-biennium time frame that is updated biennially and takes into account emerging needs and priorities. Also, unlike the operating budget appropriation, capital construction funds from the state must be spent on the explicit project identified in the budget request. Capital requests are included only when they are aligned with the university’s mission and goals, identified as priorities by the Infrastructure Working Group (IWG) and within the parameters set by the Board of Trustees. Following approval by the board, the finalized budget request is forwarded to the HECC for consideration of inclusion in the biennial budget request to the governor and legislature.

The HECC then allocates the biennial state appropriations to the individual Oregon public institutions. OSU develops an annual budget each year of the biennium, based on the usual disbursement of 49 percent of the unrestricted state appropriation in year one and 51 percent in year two. Throughout the fiscal year, the budget office monitors both revenues and expenses to verify the accuracy of unit spending as compared with budget projections.

Exhibits 2.F.3

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2.F.4 Accounting System

The institution ensures timely and accurate financial information through its use of an appropriate accounting system that follows generally accepted accounting principles and through its reliance on an effective system of internal controls.

Oregon State University uses Banner, an Enterprise Resource Planning (ERP) system that allows accurate and timely financial reporting. Banner is used widely in higher education. The system facilitates financial reporting according to budget requirements and the various requirements of restricted funds and produces financial statements in accordance with Generally Accepted Accounting Principles (GAAP) for higher education institutions. The university ensures compliance with GAAP by keeping up with emerging standards through industry publications, annual trainings and an internal process for analyzing and implementing new accounting pronouncements as they are disseminated, usually years in advance of them taking effect.

OSU’s system of internal control ensures accurate and timely financial information. Regularly conducted annual external audits include an assessment of the university’s system of internal controls over all material fiscal functions; the university has achieved an unmodified opinion in each of the last six years. OSU’s Board of Trustees provides fiscal oversight through quarterly review by the board’s Finance and Administration Committee of financial operations reports and the university’s internal audit function.

All income and expenditures, including the administration of scholarships and other student support, are part of the university’s regular budgeting, accounting and auditing procedures. OSU uses two major administrative departments — the Office of Budget and Fiscal Planning and the Office of the Controller — to centrally manage both financial resources (income) and the use of those financial resources (expenditures).

Regional business centers and the OSU-Cascades business office composed of professional-level accounting staff work in tandem with central financial units to process fiscal transactions, produce reports and forecasts, and ensure compliance with fiscal and other university policies. A Fiscal Policy Committee has also been created that develops, implements and administers fiscal policy applicable to all university fiscal and accounting activities. Academic units also have a role in administering financial resources through the activities of deans and their supporting staff and are supported by a specifically assigned business center unit for their fiscal activities and transaction processing. This structure facilitates coordination and communication in the administration of fiscal operations from the inception of transactions to the compilation and reporting of the financial statements, and it has significantly contributed to the university’s clean audit opinions. OSU also has the Cooperative Open Reporting Environment (CORE), a comprehensive financial reporting system that efficiently and accurately generates financial and accounting data to meet both internal and external reporting needs.
RESOURCES AND CAPACITY

The Office of Financial Aid administers scholarships, grants-in-aid and student loans in cooperation with the Business Affairs unit within the Office of the Controller. Federally-financed loans and grants are used to the maximum extent available. Planning for federal student aid awards occurs every year and is factored into the planning for institutionally-based financial aid projections. OSU also administers several privately funded scholarship endowment funds as well as numerous privately funded scholarship programs. The Office of Scholarships works to coordinate and administer institutional waiver and foundation scholarship programs. All sources of student support are reviewed when the annual budget for student support is prepared.

Exhibits 2.F.4

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<td>Office of Scholarships</td>
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2.F.5 Capital Budget Plans, Debt for Capital Outlay

Capital budgets reflect the institution’s mission and core theme objectives and relate to its plans for physical facilities and acquisition of equipment. Long-range capital plans support the institution’s mission and goals and reflect projections of the total cost of ownership, equipment, furnishing and operation of new or renovated facilities. Debt for capital outlay purposes is periodically reviewed, carefully controlled and justified so as not to create an unreasonable drain on resources available for educational purposes.

Oregon State University’s Capital Forecast is a 10-year rolling plan that supports OSU’s vision, mission and strategic plan. It is updated annually, reflects institutional priorities and responds to opportunities. It includes campus buildings, landscapes and other infrastructure needed to support university needs. The 10-Year Capital Forecast includes major capital investments (≥ $5 million) and minor capital categorical investments ($100,000 to < $5 million).

The 10-Year Capital Forecast includes five biennial capital plans. The plans include the cost to acquire, develop, renovate and/or improve a capital asset and sources of proposed funds. Plans also provide a level of detail and transparency to inform university stakeholders about capital projects and improvements. Capital projects are solicited on an annual basis. The Infrastructure Working Group prioritizes the projects by considering life safety concerns; operational needs; facility condition; accessibility; space utilization; impacts on finance, scholarship, research and outreach; impacts on student and employee success; impacts on university reputation; and potential to leverage other sources of funding.

Collaboratively, the staff of Capital Planning and Development, OSU-Cascades Finance and Operations team, members of the Infrastructure Working Group, Capital Plan Review Group, Provost’s Council of
Deans, Provost’s Senior Leadership Team, and staff within the Division of Finance and Administration draft a 10-Year Capital Forecast for consideration by the vice president of finance and administration, OSU-Cascades vice president, provost, president and Board of Trustees. The 10-Year Capital Forecast is incorporated into the Business Forecast, which includes a section on the impact of the comprehensive forecast on debt policy ratios. The Business Forecast is presented for acceptance by the Board of Trustees.

Annually, in autumn, the Board of Trustees is updated on completed, current and proposed major capital projects. The Board of Trustees adopted a policy for approving capital projects in October 2018.

Requests for state funding are prepared every two years in the spring (even years) and submitted to the Higher Education Coordinating Commission. Budget requests to the board for major capital projects are considered on a case-by-case basis, but must appear on the 10-Year Capital Forecast.

Primary stage gates are used to ensure projects are in scope, on budget and progressing in an appropriate manner. These gates occur at the end of capital project stages including programming, schematic design and design development. Operating pro formas are developed for final capital project budget requests.

Emphasis in Corvallis is being placed on the removal of deferred maintenance and addressing capital renewal needs. Over the next decade, an annual funding source of $45 million is being created to address building repair and renewal needs on an ongoing basis. A stewardship fund is initiated as part of all new major capital projects. This fund will partially support the replacement of major building systems. Renovation of existing university buildings and facilities is being prioritized over new construction, with a particular focus on the renovation of research facilities. State bond funding is sought each biennium in support of capital improvement and renewal projects throughout the university.

Emphasis in Bend is being placed on building the infrastructure required to support new program and enrollment growth.

Exhibits 2.F.5

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2.F.6 Auxiliary Enterprises

The institution defines the financial relationship between its general operations and its auxiliary enterprises, including any use of general operations funds to support auxiliary enterprises or the use of funds from auxiliary services to support general operations.
RESOURCES AND CAPACITY

OSU clearly delineates its general operations from its Auxiliary Enterprises.\(^1\) The auxiliaries are financially separate from general operations and are not supported by general operations funds except in special situations. OSU’s general operations, supported by E&G funds, do not rely on income from the auxiliaries to balance the E&G budget. An E&G-funded general operation may charge for services it provides to an auxiliary operation. For example, when Facilities Services personnel perform maintenance work on a residence hall, it charges the auxiliary operation (in this case University Housing and Dining Services) for that service. The university does charge auxiliary operations overhead assessments for the indirect costs (business affairs, budget, president’s office, etc.) associated with supporting the operation\(^2\). The assessments vary depending on the type of self-supporting operation.\(^3\)

The university allocates some E&G funding to the OSU Foundation through a contractual agreement, and to Intercollegiate Athletics because of the ongoing long-term contributions athletics makes to the university and local community. The investment in the OSU Foundation has been significantly leveraged by the success of the capital campaign and provides a base for the next campaign. Investment in intercollegiate athletics helps to support the strategic goals of achieving a more diverse student-athlete population, recruiting academically achieving students and increasing the likelihood for successful revenue-generating sports programs. In all of these cases, the small institutional investment helps ensure university oversight of these critical operations.

Exhibits 2.F.6

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2.F.7 External Financial Audit

For each year of operation, the institution undergoes an annual external financial audit by professionally qualified personnel in accordance with generally accepted auditing standards. The audit is to be completed no later than nine months after the end of the fiscal year. Results from the audit, including findings and management letter recommendations, are considered annually in an appropriate and comprehensive manner by the administration and the governing board.

The university contracts with a nationally recognized certified public accounting firm, CliftonLarsonAllen, to conduct an annual audit of financial statements in accordance with generally accepted auditing standards. Federal compliance audits, in accordance with requirements from the Office of Management and Budget 2 CFR 200 Uniform Administrative Requirements, Cost Principle and Audit Requirements for Federal Awards (OMB UG), are also conducted annually by OSU’s external auditor. In January of each year, the external audit firm presents the results of the audit to the Executive and Audit Committee of the Board of Trustees and includes findings and management letter recommendations.\(^1,2\) OSU also has an internal audit office, the Office of Audit, Risk and Compliance (OARC), led by a chief audit, risk and compliance executive.\(^3\) The OARC is an independent, objective assurance and consulting activity.
designed to add value and improve the university's operations. It helps the university accomplish its objectives by bringing a systematic, disciplined approach to evaluating and improving the effectiveness of the risk management, control and governance processes. The OARC complies with the International Standards for the Professional Practice of Internal Auditing. The OARC uses the Committee of Sponsoring Organizations (COSO) as the model for evaluating the adequacy of internal controls within OSU. Quarterly internal audit progress reports are provided to the Executive and Audit Committee of the board.

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2.F.8 Fundraising

All institutional fundraising activities are conducted in a professional and ethical manner and comply with governmental requirements. If the institution has a relationship with a fundraising organization that bears its name and whose major purpose is to raise funds to support its mission, the institution has a written agreement that clearly defines its relationship with that organization.

The OSU Foundation leads all fundraising efforts for Oregon State University and manages the philanthropic investments alumni and friends make in the institution. The foundation is a nonprofit organization led by a 42-person Board of Trustees. The foundation works in close partnership with university colleagues to raise funds in excess of $100 million per year to support the university's priorities; develop and maintain a culture of philanthropy for the OSU community; manage an endowment of more than $500 million; and engage alumni in service to the university. Details of the foundation's relationship with the university are outlined in a formal agreement that is renewed annually after discussion between the university's and foundation's senior leaders; careful review by both organizations' legal counsel; and approval by the university's and foundation's governing boards. Additional protocols are in place to ensure the effective stewardship of donated funds.

Since its inception in 1947, the OSU Foundation has received unqualified audits. During the last fiscal year, the total return on endowed funds was 14.22 percent, placing the OSU Foundation in the top quartile of National Association of College and University Business Officers reporting institutions. Additionally, the foundation is an active participant in the Association of Governing Boards and the Council for the Advancement and Support of Education, adhering to their industry-leading practices and benchmarking against peer institutions. In 2014 the foundation concluded the Campaign for OSU, the university's first comprehensive fundraising campaign. When OSU achieved its $1 billion campaign goal, almost a year ahead of schedule, it became one of only 35 public universities to have crossed the billion-dollar mark in a fundraising campaign. Building on this powerful momentum, the foundation engaged
university, donor and alumni partners in developing a strategic plan that will guide its direction, build further capacity and increase philanthropic support through priority-setting and investments in key areas. The OSU Foundation strategic plan is a five-year blueprint for fulfilling its vision: “To create a better world through support of — and for — Oregon State University.”

Exhibits 2.F.8

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2.G PHYSICAL AND TECHNOLOGICAL INFRASTRUCTURE

2.G.1 Accessible, Safe, Secure and Sufficient Physical Facilities

Consistent with its mission, core themes and characteristics, the institution creates and maintains physical facilities that are accessible, safe, secure and sufficient in quantity and quality to ensure healthful learning and working environments that support the institution's mission, programs and services.

OSU has a wide geographical scope and encompasses many different programs, activities and services. OSU's Corvallis campus is spread across 570 acres and operates and maintains around 200 principal buildings and numerous other smaller structures. In the past 10 years, 20 major capital construction projects (≥$5 million each), totaling nearly $630 million, have added more than 1.1 million gross square feet to support OSU’s teaching, research, outreach and auxiliary efforts on the Corvallis campus.

McDonald-Dunn Forests, two adjoining tracts totaling 13,756 acres north and west of Corvallis, are used for forest and natural resources research.

The university has 12 Agricultural Experiment Stations statewide and owns more than 16,500 acres located throughout the state, including agricultural research and forest lands. Experiment Station faculty and staff manage close to 300 buildings and structures off campus, including laboratories, office buildings and storage/utility buildings. The Food Innovation Center, built in Portland in 1999, is a joint venture of OSU and the Oregon Department of Agriculture. OSU has 110 leases as lessee for land, storage, research rentals, housing and other facilities.

University Facilities, Infrastructure and Operations (UFIO) within the Division of Finance and Administration is responsible for constructing, renovating, operating and maintaining the built environment. Its stated mission is: “Supporting Oregon State University’s land grant mission by:

- Overseeing the design and development, land use planning, real estate and space management needs for Oregon State University’s built environments.
- Designing, constructing, maintaining and supporting accessible, safe, comfortable, sustainable and efficient facilities.
- Providing safe, sustainable transportation programs and services.
- Providing excellent customer service for the university.”

The Department of Capital Planning and Development within UFIO is charged with the planning, design and development of university facilities. Capital Planning supports the university’s long-term goals and priorities for responsible growth and development. This requires involvement in all aspects of the capital construction process from the generation of the initial concept to the final commissioning and closeout of a project. In the past five years, there have been 10 major capital projects (≥ $5 million) totaling $405,430,000. The funding sources: 32 percent from state funds, 37 percent from OSU revenue, 22 percent from gifts and 9 percent from other sources.

Projects completed in the last five years:
- Austin Hall houses the College of Business and opened in fall 2014. The 100,000 square-foot building has classrooms, computer labs, student conference rooms and workspace in support of the college’s academic mission.
- Tebeau Hall is an 80,000 square-foot residence hall that provides more than 300 beds and opened in fall 2014.
- The Hogg Animal Metabolism Laboratory is a 15,000 square-foot laboratory that provides hands-on learning for student and researchers and opened in 2014.
- The Student Experience Center is the home for student activities such as student government, clubs, committees and a craft center as well as the student newspaper, radio and television station. The 88,000 square-foot-building opened in winter 2015.
- Three 3,000-square foot cultural centers — the Asian and Pacific Cultural Center, the Lonnie B. Harris Black Cultural Center and the Centro Cultural César Chávez — were completed by winter 2015.
- The Learning Innovation Center (LlnC) hosts 11 general purpose auditoriums and classrooms designed for student engagement and involvement. The 130,000 square-foot building holds 2,300 classroom seats. The building also provides 600 seats for student study, work and collaboration. It is the home for the Honors College and the OSU teaching support and technology staffs. The building opened in fall 2015.
- Strand Agriculture Hall renovation was completed in fall 2015. The 105,000 square-foot building, built in 1907, received significant seismic resilience upgrades and was brought up to modern standards with major improvements in accessibility, energy use, vertical transportation and code-compliant restrooms. The building contains 16 general purpose classrooms; the College of Agricultural Sciences dean’s office and administrative staff; and research and teaching space for the College of Earth, Ocean, and Atmospheric Sciences.
- Johnson Hall is the home for the College of Engineering’s chemical, biological and environmental engineering researchers. The 60,000 square-foot building contains laboratories, a teaching auditorium and staff offices and was completed in winter 2016.
- The Valley Football Center North End Zone construction was completed in fall 2017.
- The 10,000-square foot Precision Agricultural Systems Center was completed in fall 2017.
• Construction of a new utility tunnel from the Energy Center to the existing tunnel system was completed in fall 2018. The project included redundant steam lines relocation and modifications of existing underground utilities, ensuring reliable steam distribution, which is critical for research and well-being across campus.

• The OSU Marine and Geology Repository includes an enormous refrigerated storage area, which has 28-foot-high ceilings for both cold and dry storage; up to 11 laboratory areas, including facilities for core splitters, imagery, microscopy, rock analysis, sediment analysis, CT scanning and other scanning techniques; freezer storage for frozen ice cores from Greenland and Antarctica; a laboratory where researchers can work on eight different cores at once while using digital imaging and data from the individual cores displayed on large-screen computer monitors; a seminar room for 35 people, where cores can be brought in for classes and presentations; and office space for resident scientists, staff and visiting scientists. This facility is in use and substantially complete.

Capital Planning and Development is currently managing 61 minor capital projects ($100,000 to <$5 million) and nine major capital projects (≥ $5 million). Major capital projects under construction are:

• The Oregon Forest Science Complex will include the new George W. Peavy Forest Science Center and the A.A. “Red” Emmerson Advanced Wood Products Laboratory. The facility replaces Peavy Hall and features expanded, innovative classrooms and laboratories, as well as new public spaces supporting student learning. The completion date is to be determined.

• A new 120,000-square foot upper-division and graduate student housing project will include 285 studio units and be completed by fall term 2020.

• Renovations to the veterinary hospital and teaching facilities at Magruder Hall includes a 6,000-square-foot expansion to double the size of the Carlson College of Veterinary Medicine’s small animal teaching hospital. The project will enable the college to increase its enrollment by 16 veterinary medicine students.

• The new Marine Studies Building at OSU’s Hatfield Marine Science Center will increase the region’s marine science education and research capacity. It will use state-of-the-art architectural and engineering techniques to serve as one of the first vertical evacuation tsunami sites in the United States. The 72,000-square-foot building will have a three-story academic and research core, connected to a two-story wing that includes community space, an auditorium, an innovation laboratory and other facilities.

The Department of Facilities Services operates and maintains more than five million gross square feet of buildings and 570 acres of landscapes. The deferred maintenance backlog is estimated at $650 million. The Oregon Legislature allocated $10.1 million in FY14-15, $24 million in FY16-17 and an estimated $16 million FY18-19 for capital improvement and renewal. Emphasis is being placed on the removal of deferred maintenance and addressing capital renewal needs. Over the next decade, an annual funding source of $45 million is being created to address building repair and renewal needs on an ongoing basis. A stewardship fund is initiated as part of all new major capital projects. This fund will partially support the replacement of major building systems. Renovation of existing university buildings and facilities is being prioritized over new construction, with a particular focus on the renovation of research facilities. State bond funding is sought each biennium in support of capital improvement and renewal projects throughout the university. Over the last five years, the university Energy Center (co-generation facility) has contributed an estimated $10.3 million in offsets to the electricity charges. From 2009 to 2017, OSU implemented well over $3 million in stand-alone energy projects or energy enhancements to other...
projects, leveraging at least $1.8 million in incentives, including tax credits, utility incentives, public-private partnerships and federal stimulus money. This has reduced project costs to around $1.2 million. Because of those investments, the university saves at least $700,000 in annual utility costs today.

**OSU-Cascades**

In 2016, OSU-Cascades opened the new campus in Bend, Oregon. Previously co-located with Central Oregon Community College, the initial 10-acre campus and Graduate and Research Center (located half a mile to the east) includes approximately 187,000 square feet of academic and student life facilities. The campus has a capacity of 1,890 students and serves 1,259 current students in 18 undergraduate and four graduate degree programs. The new facilities were designed to be accessible, safe, secure and environmentally sustainable based on current design practices with an emphasis on flexibility for evolving pedagogy. Ergonomic workstations, operable windows, dimmable LED lighting systems, electronic access controls and modular furniture systems allows for easy reconfiguration and efficient space utilization.

The long-range development plan for OSU-Cascades is a road map for continued development of the campus to meet the needs of future students, faculty, researchers and the community.4

Projects completed in the last five years:

- The Graduate and Research Center was the first building acquired by OSU-Cascades. In 2016, OSU-Cascades received an Oregon State Regional Solutions Center grant to remodel the building to add two classrooms and build an innovation incubator. The total remodel was for 6,000 gross square feet.

- The first step in developing and opening a new campus for OSU-Cascades in Bend was to acquire and develop a 10-acre parcel. The site development included on- and off-site infrastructure, filling and grading the site to buildable specifications.

- In addition to the 10-acre parcel, OSU-Cascades purchased a 46-acre pumice mine. The acquisition of the land included detailed geotechnical and soils analysis.

- Tykeson Hall, the 45,000-square-foot academic building on the new campus, was recently recognized for design excellence by the American Institute of Architects Portland. Designed by Portland-based architecture firm Bora, it is described by its architects as ambitiously sustainable, with net-zero-ready and energy efficiency features, along with natural light in every hallway and classroom. Tykeson Hall houses eight classrooms including a learning studio, three science and engineering labs, a computer lab, learning commons, tutoring center, faculty and administrative offices, student life offices and conference rooms.

- Obsidian Hall was completed in 2016. Sustainability components include net-zero-ready and energy efficiency features such as use of regional wood materials, a hydronic heating and cooling system, water-saving devices, triple-glazed windows and readiness for connection to a possible future campuswide heating plant. It is home to the Beaver Dam dining center and coffee shop, four classrooms, a maker’s space and administrative offices.

- The residence hall was completed in December 2016.

- OSU-Cascades acquired a 72-acre demolition landfill for future campus expansion. The acquisition included a thorough environmental analysis, a prospective purchaser agreement with the Oregon Department of Environmental Quality and a master plan with the City of Bend. The acquisition was completed in 2018.
OSU-Cascades finance and operations is currently managing one minor capital project, defined as $100,000 to less than $5 million, and three major capital projects greater than $5 million. Major capital projects under construction:

- Starting in late 2018 and through 2020, OSU-Cascades will begin the reclamation and remediation of the 46- and 72-acre parcels. The development will include environmental cleanup to Oregon Department of Environmental Quality standards and filling and grading of the pumice mine to Oregon Department of Geology and Mining Industries standards.

- Starting 2019, OSU-Cascades will design and build its second academic building. The new building will hold engineering teaching and research labs; art labs; physical therapy and kinesiology teaching and research space; flexible labs for natural resources, outdoor products, environmental science and sustainability programs; general purpose classrooms; a makerspace; and faculty and administrative offices.

**Hatfield Marine Science Center (HMSC)**
Originally established as a marine laboratory for OSU, HMSC currently hosts collaborative research and education programs from seven OSU colleges and six state and federal agencies on its 49-acre site. OSU facilities include about 90,000 square feet of academic and research space, including a running seawater facility that pumps up to 1 million gallons per day through laboratories and classrooms in eight of the nine existing state and federal buildings. With construction of the 72,000-square foot Marine Studies building expected to be completed in 2020, HMSC's OSU facilities will be prepared for receiving an greatly expanded student population tied to an expanding Marine Studies academic program. Key to the success of this program growth is completion of plans for significant expansion of student housing facilities as well. Current housing capacity on site is about 100 students, with plans for a residence hall that can house up to 350 students to be constructed near HMSC, but out of the tsunami hazard zone.

**Statewide Facilities**
OSU faculty and programs are distributed throughout the state at more than 45 locations. County Extension Service offices are typically county-owned facilities provided through intergovernmental agreements used by OSU employees in the conduct of their work. The Oregon Agricultural Experiment Station is the principal agricultural research agency in the state and conducts work at 11 branch stations distributed throughout the state’s diverse ecosystems. The Forest Research Laboratory manages eight forested tracts that serve as active management demonstrations supporting research and learning.

Exhibits 2.G.1

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2.G.2 Policies Regarding Hazardous and Toxic Materials

The institution adopts, publishes, reviews regularly and adheres to policies and procedures regarding the safe use, storage and disposal of hazardous or toxic materials.

OSU has developed policies, procedures, education and training to ensure safe use, storage and disposal of hazardous/toxic materials in accordance with local, state and federal requirements. Environmental Health and Safety (EHS) oversees the management of these materials including the safe use, storage and disposal of radioactive material, hazardous chemicals and infectious agents. EHS assists departments in maintaining a safe and healthy university environment for staff, faculty, students and visitors, including, but not limited to, policies, plans, programs and services listed in Exhibits 2.G.2.1-8

OSU-Cascades
OSU-Cascades follows all policies, procedures, education and training required by the EHS program. The lab preparator at OSU-Cascades is required to maintain an up-to-date chemical inventory, create an annually reviewed, lab-specific chemical hygiene plan and ensure all personnel and students working in a lab space have the appropriate training on record. OSU-Cascades also works with EHS to facilitate lab inspections for all labs at OSU-Cascades. A common hazardous waste supply area is stocked and maintained for all labs.

Hatfield Marine Science Center
HMSC follows all policies, procedures, education and training required by EHS. Each principal investigator with a lab at HMSC is required to maintain an up-to-date chemical inventory, create an annually reviewed, lab-specific chemical hygiene plan and ensure all personnel and students working in a lab space have the appropriate training on record. HMSC also works with EHS to facilitate lab inspections for all OSU labs at HMSC. A common hazardous waste supply area is stocked and maintained for all labs. HMSC is designated as a small-quantity generator of hazardous waste under EPA rules, and the facility manager works with EHS to conduct hazardous waste pickup twice a year or whenever necessary.

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2.G.3 Physical Master Plan

The institution develops, implements and reviews regularly a master plan for its physical development that is consistent with its mission, core themes and long-range educational and financial plans.

The Oregon State University Campus Master Plan (CMP) is the current document that assists in the development, improvement and renewal of facilities and infrastructure on the Corvallis campus. The CMP provides the framework and road map for the physical manifestation of OSU’s mission and strategic initiatives for advancing the science of sustainable Earth ecosystems, improving human health and wellness, and promoting economic growth and social progress. In combination with the intellectual, economic and technological needs of the campus, the plan guides the physical development of the university. A large portion of OSU’s campus was designated a National Historic District in 2008. As a result, all significant development within, and in some cases adjacent to, the Historic District is subject to a historic review process by the City of Corvallis. Development also remains subject to the standard regulations, such as local planning and building code requirements. OSU does annual monitoring for the City of Corvallis of development, car and bike parking use, as well as models transportation demand. The Campus Planning Committee is an advisory committee that reports to the vice president for finance and administration to provide oversight for the physical development of the campus and make recommendations on issues related to campus development. The Campus Sign Plan describes a harmonious and aesthetically pleasing arrangement in the following three areas of design: what signs say, including to whom and for what purpose; how they say it; and where signs are located.

OSU has begun an 18-month process to create a new Strategic Framework Plan with the aid of a team of external consultants. This plan will document and guide the physical development of the university over the next decade in support of its academic, research and outreach missions; quality of student life; and place in the community. The Strategic Framework Plan for the Corvallis campus will identify the university’s values and vision for how the campus will evolve over the next 10 years. It will provide the necessary specificity to inform and guide decisions regarding the best ways to accommodate growth, new development and redevelopment in support of the university’s strategic mission, plan and actions. It will provide guidance for the upcoming amendment of code standards, but it is not a regulatory document.

The strategic framework planning effort will consist of five components: 1) current state of the built environment and related open spaces; 2) growth projections and the 10-year capital forecast; 3) vision, guiding principles, core values and goals for how the campus should look, feel and function in 10 years; 4) planning concepts and design guidance; and 5) implementation recommendations and priorities. Campus stakeholders and community members internal and external to OSU will be included in the visioning process to determine OSU’s collective campus and community values. The plan will address buildings and structures, utility infrastructure, the transportation network, parking facilities, open space network and recreational and athletics facilities. The concepts may include guidance regarding building location and siting; building height, massing and setbacks; edge conditions and treatments; important linkages, connections and corridors; and circulation networks.

The Strategic Framework Plan is informed by and will guide OSU’s 10-Year Capital Forecast, deferred maintenance backlog reduction plan, space plan, accessibility plan, greenhouse gas emissions and other environmental plans, transportation plans and many other programs that are dedicated to ensuring that OSU has and will have the appropriate quality and quantity of space needed to complete its mission.
OSU-Cascades

Encompassing a 128-acre campus, the OSU-Cascades Long-Range Development Plan (LRDP) was completed in 2017. The plan reflects a nearly two-year effort to evaluate and synthesize student, faculty and staff input with community feedback in areas of sustainability, community integration, health and wellness, arts, culture and enrichment. The LRDP identifies a phased approach for 1.2 million gross square feet of additional facilities to develop and enhance up to 50 academic programs, as well as provide a vibrant student life environment with access to affordable on-campus housing for up to 40 percent of the anticipated 5,000-student population. An institutional master plan was submitted to the city of Bend for review and adoption in early 2018, and periodic updates of development status are to be submitted at a minimum of every five years. OSU-Cascades will conduct ongoing facility reviews to ensure the physical campus amenities are supporting the institution’s mission and core themes while meeting its long-range educational and financial plans.

Hatfield Marine Science Center

HMSC is currently undergoing long-range strategic planning in anticipation of significant growth in student population associated with the Marine Studies Initiative, along with new faculty and research activities. This growth will necessitate both a buildup of existing services and facilities, as well as introduce a variety of additional services typically associated with a large student presence. HMSC’s current population includes a mix of about 150 to 200 OSU faculty, staff and students, of which anywhere from 25 to 75 are students. About 200 state and federal agency personnel are stationed at HMSC. Over the next 5 to 10 years, the population at HMSC is expected to reach up to 1,000 people, about half of which will be students. HMSC’s long-range planning will ensure the physical campus amenities and services are supporting the institution’s mission and core themes.

Exhibits 2.6.3

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2.G.4 Equipment

Equipment is sufficient in quantity and quality and managed appropriately to support institutional functions and fulfillment of the institution’s mission, accomplishment of core theme objectives and achievement of goals or intended outcomes of its programs and services.

The campus is comprehensively wired and has wireless internet access in all buildings. Computers and other technological equipment are updated regularly. The majority of university classrooms are equipped with state-of-the-art instructional technology. Much of the technology for classrooms and instructional laboratories is funded through the Technology Commons Fund. This and other aspects of technology provided at OSU are addressed in sections 2.G.5 through 2.G.8.

Since the last accreditation visit, the university has successfully replaced furniture in the majority of classrooms, with an emphasis on accommodating flexible instructional configurations. Many instructional laboratories have been improved by equipment upgrades provided through the Technology Commons Fund. This is particularly important because of OSU’s Bacc Core requirement for all students to take three science courses, each with a laboratory component.

Research laboratories, usually funded by grants, typically have state-of-the-art equipment, even though furnishings and other materials may be dated. The significant increase in new construction and renovation projects during the last decade has contributed to the general improvement in classroom and instructional laboratory equipment. Similarly, the continued growth of the research enterprise has contributed to well-equipped research laboratories.

New and used equipment is acquired through purchases, installment purchases, leases, loans, gifts, transfers, trades or fabrications. The fixed assets equipment inventory is an accounting procedure as well as a method of physically tracking assets.

Inventory Control

Preliminary inventory records are an automatic part of the invoice payment process for equipment acquired with OSU-administered funds. As a recipient of federal grants and contracts, OSU is required to be in compliance with the Office of Management and Budget Circular A-110, Uniform Administrative Requirements for Grants and Agreements With Institutions of Higher Education, Hospitals and Other Non-Profit Organizations. OMB Circular A-110 states in part: “A physical inventory of equipment shall be taken and the results reconciled with the equipment records at least once every two years. Any differences between quantities determined by the physical inspection and those shown in the accounting records shall be investigated to determine the causes of the difference. The recipient shall, in connection with the inventory, verify the existence, current utilization and continued need for the equipment.”

The university has a longstanding and ongoing program to support the acquisition of new, research-related capital equipment and to provide support for the repair, upgrading and maintenance of existing non-fixed capital assets. The university, including the central administration in collaboration with the academic units, routinely invests more than $2.5 million annually, primarily for state-of-the-art research equipment. The central administration annually contributes in excess of $900,000 (in addition to funds spent by academic units) for the operation and maintenance of core research facilities (e.g., electron beam instrumentation and mass spectroscopy). In addition, the university has recently made additional funding available for equipment upgrades. During 2010-11, the university invested $4 million in upgraded research equipment and an additional $3 million for teaching equipment.
Surplus property is recycled as much as possible to other departments on campus, other state agencies or qualified nonprofit organizations. Some property is sold at public auction after state approval. Specific information and procedures relating to equipment acquisition management, inventory, disposal and record keeping are outlined in the Property Management Manual.3

Another aspect of property management concerns facilities-related equipment. The preventive maintenance program routinely services and inspects 8,500 pieces of facilities-related equipment, as well as the building systems in more than 5.5 million square feet of facilities. This program maximizes the life of equipment, extends value, increases efficiency and prevents breakdowns.

Exhibits 2.G.4

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2.G.5 Technology Systems and Infrastructure

Consistent with its mission, core themes and characteristics, the institution has appropriate and adequate technology systems and infrastructure to support its management and operational functions, academic programs and support services, wherever offered and however delivered.

The Division of Information and Technology1 (UIT) is responsible for creating and maintaining the technology ecosystem and providing the insights and information that are foundational to innovation and academic excellence. The vice provost for information and technology2 manages OSU’s central IT organization and aligns information technology systems and services across colleges and other distributed IT organizations through UIT policies, governance processes and consultations.

UIT guides the university’s information technology enterprise based on the 2016-18 Strategic Investment Plan3, which makes adopting cloud-based solutions a priority in order to offer contemporary, secure, scalable, 24/7 technology services and solutions to OSU’s locations in Oregon and wherever faculty and students study or do research around the world. UIT is currently developing a new strategic investment plan for 2019-21.

UIT has three operational units that support university-wide technology systems and infrastructure:

- The Office of Information Security (OIS)4
- Information Services (IS)5, the central IT operating organization with five functional departments
- Institutional Analytics and Reporting6, which provides campus access to institutional data — including the Cooperative Open Reporting Environment — and conducts institutional research
Information Security

Foundational to all technology systems and infrastructure is the OSU information security practice. The University Data Management, Classification and Incident Response Policy, developed in consultation with the university’s Data Governance Council is applicable to all university units, employees, students, visitors, contractors and affiliates, as well as anyone who produces, manages or accesses university data. The policy establishes a framework for protecting the university’s information resources and complying with all federal and state laws and regulations. Through the policy, data stewards are established for different bodies of information, such as admissions or payroll records. Data is classified into one of three categories: unrestricted, sensitive and confidential. With the assistance of the IT Security Governance Committee, standards of care have been established for these three types of information.

Information security is promoted by institutional practices: access to the Banner database and to data warehouse information is role-based, limited to business needs and must meet appropriate standards and training requirements established in consultation with data custodians and governance. Systems are protected through the use of application firewalls, multifactor authentication, and a change management process. Systems of record that house core administrative data undergo an annual audit conducted by an external agency. An annual self-assessment is employed to ensure OSU uses best practices to secure its administrative systems.

The Office of Information Security (OIS) provides operational support for these policies and serves as the security operations center for the university. In that role, it identifies and mitigates IT security risks, performs assessments of third-party services and provides information security training for university personnel. OIS’ services include network security monitoring and analysis, vulnerability scanning, as well as malware and intrusion detection.

Administrative Systems and Institutional Reporting

Enterprise Computing Services manages the university’s Banner ERP system, which includes admissions, registration, financial aid, accounts receivable, human resources, general ledger and payroll modules. It also manages ancillary systems for reporting, credit card transaction processing and document imaging. These data applications are integrated with each other, Canvas and other university administrative applications through a data integration platform. This platform prevents errors and inefficiencies associated with duplicating data entry in multiple applications, and it enables the flow of data to the university’s data warehouse. Based on the data from that warehouse, the Cooperative Open Reporting Environment (CORE) provides more than 1,000 standard reports.

Faculty, staff and students have unified access to multiple administrative applications through a web portal and a mobile application. A unified customer relationship management platform is under development to offer advisors, administrators and others integrated access to information on students and faculty and to create a unified approach to engagement with students. UIT has a cloud-based content management system for hosting campus websites.

Instructional Technology Systems

OSU has a cloud-hosted instructional environment, Learn@OregonState, centered around the Canvas learning management system. It offers unlimited storage for instructional videos, support for student response through audience response systems (clickers), plagiarism detection and ancillary tools, such as ReadSpeaker for accessibility. Learn@OregonState is the common instructional platform for OSU’s credit,
professional and noncredit educational programs. OSU co-founded the Unizin consortium to provide a forum for collaboration with other universities seeking to create and enhance similar digital learning environments.16

The Classroom Technologies department ensures that instructional programs are supported with appropriate technology-enhanced learning spaces.17 Staff design, implement, support and regularly refresh the computer and audio-visual environments in curricular and cocurricular spaces. This includes approximately 150 shared, centrally scheduled and managed classrooms and 250 rooms owned by administrative units and colleges or departments, including classrooms, meeting rooms, instructional labs and other spaces. Classroom Technologies supported rooms have projectors, document cameras, custom teaching podiums and a mix of additional presentation technologies, such as electronic whiteboards and Blu-ray players. The shared, centrally scheduled classrooms also have instructional computers, assistive listening technology for the hearing impaired, as well as support for student response systems (clickers) with presentation capture systems available in large lecture halls. The common technologies and designs of these spaces mean that faculty and students have a consistent experience across the multiple rooms in which they teach and learn.

**Media Authoring and Production**

IS enables faculty and student production of digital media for use in classes, for internet distribution or for national and international broadcast. Hundreds of short videos, as well as lectures and studio productions for courses, are produced and delivered. IS also supports recording of online, in-person or video conferencing events. Video conferencing facilities support delivery of Corvallis-based courses to classrooms in Bend and Newport and will deliver courses to OSU’s new classrooms in Portland. Professional production services are available, or faculty or students may develop their own media through the use of campus production facilities, loaned equipment and access to editing software.18, 19

**End User Computing**

OSU faculty, staff and students have access to cloud-based productivity solutions (Box for file storage, Google G Suite and Microsoft Office365 as well as Cisco Webex for web-based conferencing). Use of laptops, smartphones or other student- and university-owned mobile devices is enabled by more than 4,000 wireless access points in the primary academic, research and residential buildings on campus. Student access to computers, as well as specialty devices and software, is made possible through more than six computer classrooms and 22 computer labs, as well as laptop checkout programs. More than 100 desktop software applications (MATLAB, SPSS, etc.) are available for instructional and research use in computer labs and through internet-accessible virtual desktops. Applications can be downloaded to university-owned computers, and selected applications can be downloaded to student-owned computers.

**Network**

IS’ cloud-first strategy, in addition to its goal of supporting increasingly data-intensive research, is maintained by a campuswide fiber network with redundant fiber connections between the campus network core and major academic, administrative and research buildings. Continuity of business operations is also ensured through redundant network head ends. IS sets the standards for campus networks and for building wiring, whether in new buildings or for building renovations, ensuring the wiring is compatible with current industry standards. The architecture of the campus network permits OSU to have multiple virtual networks, each with the level of security appropriate for a particular purpose, such as the protection of administrative applications or high-speed research data flows. The campus is connected to Oregon’s regional higher education network and through that network with its
sites across Oregon. OSU’s network is implementing new high-speed fiber connections to its three major auxiliary sites — Newport, Bend and Portland — that will offer faculty and students at those locations the same quality of technology experience as at the Corvallis campus.

Computing Infrastructure
IS maintains central campus data centers to host the Banner ERP system and other on-campus administrative applications. Central on-campus enterprise computing and storage services are available for small-scale, primarily administrative needs. The central data centers also have limited space for systems of some colleges and research units. Selected core systems are replicated at a Bend data center or Amazon Web Services.

Large-scale research computing clusters are hosted in college data centers. OSU complements on-campus research computing resources through participation in the national XSEDE network of NSF-sponsored high-performance computing resources.

OSU has also entered into an enterprise agreement with Amazon Web Services to provide academic or administrative units with scalable, cloud-based computing and storage resources that complement on-campus resources. AWS also offers the facilities needed for faculty to comply with new federal requirements for protection of controlled unclassified information.

Exhibits 2.G.5

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The institution provides appropriate instruction and support for faculty, staff, students and administrators in the effective use of technology and technology systems related to its programs, services and institutional operations.

Support structures enabling business and instructional use of technology by faculty, staff, students and administrators are provided by an on-demand help desk, consulting functions and formal in-person and online training programs:

- **Instructional Software**: One-on-one consultations are available to faculty, and weekly webinars are offered on educational technology topics. Online training and support is also offered for the core Learn@OregonState suite of instructional systems, Canvas learning management system, media management, presentation, plagiarism detection and student response systems. Around-the-clock help desk support is available for Canvas.1,2

- **Classrooms Technologies**: A help desk service offers on-call response to problems with audio-visual equipment in classrooms and other locations. New technologies are demonstrated for evaluation by faculty, staff and departments. Consulting is offered on AV design for new buildings and renovations.3

- **Service Desk**: A central support desk, available for in-person, phone and online consultation, supports use of university-owned and personal devices, responds to common questions and provides in-depth consulting for complex issues to students, faculty and staff. Central help desk services are complemented by college-based help desks for the colleges of Science, Engineering, Forestry and Business.4

- **Administrative Data Systems**: Classroom and online training is offered for Banner and the data warehouse. Training includes the functions and navigation of the various Banner modules, the data warehouse and security and confidentiality training.5

- **Data Security**: Workshops help employees work securely and help prevent data loss. Consulting is available to staff, faculty and students on appropriate safeguards and practices for protection of sensitive and personally identifiable data to be used or gathered as part of research and administrative activities.6 Consulting is available to researchers in securing human subject data and meeting regulatory compliance needs.

- **Ecampus Faculty Support and Development**: Ecampus requires ongoing training for faculty developing and teaching online courses.7 Many training options and modalities are available, including custom trainings. Additionally, Ecampus maintains a Faculty Support email account, and instructional designers provide support to faculty.8

- **Ecampus Multimedia Development**: Ecampus provides multimedia development support for online courses including videography, voice-over-screen lecture, animation, custom programming, 3D scanning and animation and virtual and augmented reality development.9
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The university facilitates regular participation in university training events on a variety of topics of current interest and emerging technology. Technology and user needs regularly evolve, so training options must similarly evolve. OSU continues to bring more information online, record webinars and improve documentation to help the university community use technology effectively whether they are on the Corvallis campus or connecting from afar.

Exhibits 2.G.6

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| 6  | Data Security uit.oregonstate.edu/ois                   |
| 7  | Ecampus Faculty Development ecampus.oregonstate.edu/faculty/development |
| 8  | Ecampus Instructional Design Services
     | ecampus.oregonstate.edu/faculty/instructional-design    |
| 9  | Ecampus Multimedia Development Services
     | ecampus.oregonstate.edu/faculty/multimedia              |

2.G.7 Technological Infrastructure Planning

Technological infrastructure planning provides opportunities for input from its technology support staff and constituencies who rely on technology for institutional operations, programs and services.

The university has an extensive set of formal and informal mechanisms to obtain input from technology staff and those who rely on technology:

- **Governance Committees**: Three committees — the IT Security Governance Council⁴, the Data Governance Council⁵ and the Instructional Technology Coordination Committee⁶ — provide a forum for input and decisions on major IT initiatives and on-campus IT policies.

- **Focused Advisory Committees**: Additional groups provide input from the constituencies for important technology platforms, including Learn@OregonState Advisory Committee⁷ (responsible for the suite of instructional software), the Administrative Computing Users Group (Banner and related systems) and web and mobile advisory groups. There are other advisory groups for specific products, such as DocuSign.

- **Technology Community Groups**: Two major groups are venues for IT community dialog and a source of input on technology projects and services: 1) the IT Coordination Committee⁸, a regular meeting of lead college or administrative unit IT staff and managers, which has a chair and agendas chosen by the community; and 2) the Department Computer Administrators (DCA), a meeting for frontline IT staff.
• **Project Reviews:** Regular opportunities to comment on IT projects are also offered through quarterly project reviews and by the quarterly Information Services’ plenary meetings. These are open to IS staff and IT community members.

• **Ad Hoc Committees:** Committees are also created as needed for major initiatives and product decisions, such as the choice of a cloud storage service.

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<td>5</td>
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2.G.8 Technological Planning and Updates

The institution develops, implements and reviews regularly a technology update and replacement plan to ensure its technological infrastructure is adequate to support operations, programs and services.

Oregon State University has a central fund, the Technology Commons Fund (TCF), to help ensure regular updates and replacements for its instructional technology infrastructure. The TCF provides annual funding that supports the regular refreshing of equipment. This encompasses audio-visual and other presentation systems in 400 instructional spaces, including instructional labs, auditoriums, lecture halls, seminar rooms and other facilities, including equipment in approximately 150 spaces centrally scheduled by the university registrar and in another 250 spaces administered by individual colleges and administrative units. This equipment use is monitored and replaced more frequently when it is heavily used. Classroom Technologies, a unit of Information Services, plans and carries out this equipment replacement process.

The TCF also provides annual funding to support replacement of student and instructor-used computers in central computer classrooms, open access computer labs, laptop loan programs and computers at the instructor podiums in centrally-scheduled classrooms. Funding is also provided for computers in tutoring spaces and in colleges’ computer classrooms and instructional labs. It is standard practice to replace these computers every four years. Central computer lab managers and college IT managers maintain inventories of their computer equipment and annually submit funding requests to the TCF.

OSU funds its on-campus and off-campus network and telecommunications infrastructures through a combination of bond funding, a central annual operating fund and a reserve fund. IS maintains a schedule for replacement of network and telecommunications equipment and replaces this equipment as needed to ensure adequate performance of network and telecommunications services. IS also monitors and
RESOURCES AND CAPACITY

maintains an inventory of OSU’s long-term on- and off-campus assets (e.g., cable and fiber plant, building infrastructure, etc.) and upgrades these facilities. Finally, IS sets standards for campus building wiring infrastructure and directs updates of building wiring during planned renovations.

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uit.oregonstate.edu/tech-funding/technology-commons-fund
js.oregonstate.edu/network-telecom/network-billing-model
CHAPTER 3: Planning and Implementation
The institution engages in ongoing, participatory planning that provides direction for the institution and leads to the achievement of the intended outcomes of its programs and services, accomplishment of its core themes and fulfillment of its mission. The resulting plans reflect the interdependent nature of the institution’s operations, functions and resources. The institution demonstrates that the plans are implemented and are evident in the relevant activities of its programs and services, the adequacy of its resource allocation and the effective application of institutional capacity. In addition, the institution demonstrates that its planning and implementation processes are sufficiently flexible to address unexpected circumstances that could impact the institution’s ability to accomplish its core theme objectives and to fulfill its mission.

### 3.A INSTITUTIONAL PLANNING

#### 3.A.1 University Planning

The institution engages in ongoing, purposeful, systematic, integrated and comprehensive planning that leads to fulfillment of its mission. Its plans are implemented and made available to appropriate audiences.

**Comprehensive Strategic Planning**

Oregon State University’s planning consists of comprehensive strategic planning which informs annual and long-term planning, and evaluation oversight from the Board of Trustees. While OSU has long had a history of strategic planning, the current institutional planning processes were established under the leadership of Edward Ray, who became president of the university in 2003. Since that time, OSU has been guided by a series of five-year strategic plans. In 2014, OSU implemented its third strategic plan (SP3.0) to guide the university from 2014-18. The process led to a revised set of metrics to track university outcomes such as retention, diversity, research output and fundraising. Each metric had a baseline and a target value for the 2017-18 academic year, and these are discussed in Chapter 4.

The fourth phase, *Strategic Plan 4.0: Transformation, Excellence and Impact* (SP4.0), was approved by the Board of Trustees in October 2018 and launched in January 2019. SP4.0 was developed following a process to envision OSU’s future promise, focus and distinction among premier research institutions. The resulting document, SP4.0 (2019-23) continues the university’s progress toward Vision 2030, reflecting OSU’s continuous effort to look to its future and tirelessly seek even more meaningful ways to serve the state of Oregon, the nation and the world.

OSU’s commitment to reviewing its strategic plan every five years ensures the plan is a living document designed to guide leadership decisions and create a sense of shared purpose for the campus community. The intent is to continuously review the university’s five-year performance and progress toward its strategic goals, as well as assess environmental conditions and emerging national and global issues and opportunities. In addition, by engaging the university community and relevant external stakeholders, the process helps the university make relevant changes and adjustments in goals and key strategic metrics and their targets.
Each strategic plan builds on the previous one, articulates the university’s vision and core values, and serves as a blueprint for future success. The key elements of SP3.0 include three overarching goals, strategies and initiatives to advance each goal, a set of institutional metrics for each goal and targets benchmarked against a set of aspirational institutions.

Implementation of each strategic plan is anchored in the Office of the Provost. Annual progress reports are made available to the campus community and key stakeholders.

The development of institutional strategic plans leads to the development of strategic plans for each academic college and major administrative division of the university to ensure their priorities are aligned with institutional priorities and goals. Some plans are modeled on the university’s strategic plan, while others are uniquely designed to meet the specific role and conditions of a particular college or division.

Strategic plans for each college and key administrative units are provided via a link found in Profiles of Colleges and Administrative Units located in Appendix 3.A.1.

The current and former strategic plans are made available online, and print copies of the current plan are also widely distributed. The president and provost regularly report to the university community on progress toward strategic goals. Metrics are reported annually as part of the provost’s annual report to the campus community and as part of the Presidential Assessment conducted by the OSU Board of Trustees, which has responsibility for monitoring the effectiveness of the plan. In his annual address to the university community, the president outlines the broad set of opportunities, challenges and priorities that provide the context for the academic year. The president’s annual State of the University addresses are posted online.4

An example of the university’s purposeful and synergistic nature of institutional and college plans is the decision to pursue Council on Education for Public Health (CEPH) accreditation of the College of Public Health and Human Sciences.5 In Strategic Plan II, the university identified improving human health and wellness as a signature area of distinction, noting the university was uniquely positioned to enhance the quality of the human lifespan through interdisciplinary research and academic programs, as well as a widespread network of Extension Service connections. OSU then set the strategic plan goal of providing outstanding academic programs that further strengthen performance and preeminence in the university’s signature areas of distinction. The institutional goals, objectives and strategies were mirrored at the college level, and in 2014, OSU’s College of Public Health and Human Sciences was granted CEPH accreditation, making it the first school of public health in Oregon to earn that recognition. In this way, OSU used a comprehensive planning process to further its mission of promoting economic, social, cultural and environmental progress for the people of Oregon, the nation and the world.

Annual Planning

Oregon State University engages in comprehensive annual planning. This planning begins with unit-level review, using a standard planning template that requires units to address core areas of the university’s mission (teaching, research, and outreach and engagement) and highlight opportunities for the near-term horizon. Academic colleges and major administrative divisions integrate these unit-level comprehensive plans and review annual progress on strategic plan goals to create unified major unit goals. The Office of the Provost further integrates major unit plans into university-wide planning goals to determine institutional programs, budget and staffing to fulfill its mission and strategic plan goals.

All college and divisional annual plans are available online, dating back to 2004-05, when Strategic Plan I was launched.6
Annual planning efforts also include individual goals from executive leaders. Direct reports to the president and provost provide an annual self-assessment regarding goals stated for the previous year, and goal setting for the coming year. This final step creates alignment and cohesion between university level, unit level and individual goal planning.

**10-Year Business Forecast: Financial, Enrollment and Capital Planning**

Oregon State University takes a decade-long view to identify long-term trends in the university’s finances that support or jeopardize mission fulfillment and the strategic plan. The 10-Year Business Forecast provides a look far enough ahead to take corrective action or to plan for additional investments and to carefully consider the long-term impacts of current programmatic and financial decisions. The forecast considers enrollment projections; tuition rates and institutional financial aid; expense projections for inflation, benefits, salaries and enrollment growth; and new construction, renovation and repairs with associated operating and debt costs. The forecast is updated in January of even-numbered years and is available online. The current forecast will be updated for consideration by the OSU Board of Trustees in January 2020.

Financial planning is an essential component of the forecast. The process models the university’s financial position, including major components related to Corvallis campus Education and General funds; OSU-Cascades Education and General funds; Statewide Public Services funds; restricted funds (including financial aid, external grants and contracts, and OSU Foundation funds); auxiliary funds; and capital planning and funds. The forecast is further informed by college and divisional budget realities. The annual budget cycle is described in 3.A.4.

Enrollment planning, which is critically important for the forecast, has historically included a five-year plan that outlines enrollment projections by academic college and by learner type (undergraduate, graduate, on-campus, online and hybrid). The 2012-17 plan is undergoing a major refresh to clarify the roles of various offices and units in advancing OSU’s enrollment goals; articulate goals and tactics for OSU’s different locations and modalities; and set specific targets for 2019-20 recruiting, as well as methods for communicating those targets and tracking accountability to meet those targets.

It has been a significant challenge to create alignment between university- and college/unit-level enrollment goals, and to deploy resources and execute strategies in order to meet those goals. Over the past year, OSU has undertaken a more strategic approach to enrollment management. The provost has appointed a Strategic Enrollment Management Steering Committee to develop annually an updated university-level undergraduate and graduate enrollment plan; oversee its implementation; and monitor progress on achieving the plan’s goals.

Working with academic leaders and senior leaders on the provost’s enrollment team, the Enrollment Steering Committee will recommend refinements to immediate and future enrollment goals, based on admissions, matriculation, retention and graduation outcomes, as well as an assessment of state, regional and national trends; recommend adjustments to enrollment assumptions in the forecast and assess the financial implications of those adjustments; serve as a coordinating body to ensure that differences in aspirational enrollment goals and outcomes achieved over time are reflected in the university’s academic and financial planning; and recommend investments and changes in enrollment management and admissions policies or practices that are necessary to realize enrollment goals. In 2018, the provost launched a search for a vice provost for enrollment management. This is an elevated leadership position, in terms of title, authority and responsibility for advancing a cohesive and aligned university-wide enrollment management strategy.
Capital planning includes management of real estate; land-use planning; design and development; and space-management needs for the university's built environment. Under the direction of the senior associate vice president for finance and administration, the Office of Capital Planning and Development leads this effort, along with OSU leadership, academic units, and city officials. The university's capital plan includes both short- and long-range goals to define, prioritize and plan for capital projects. These goals are rolled up into the forecast.

**Research Planning**

Informed by SP3.0 and created in part to assist with the development of SP4.0, the Research Office engaged broadly with research faculty, distinguished professors, internal and external stakeholders and university leadership to develop a research strategic plan. The Research Office Work Plan (2018-23) articulates a list of actions required to secure new revenue to advance the research mission; modernize research infrastructure and business processes; leverage partnerships to broaden the impact of university research; take research to the communities that need it; and build a global reputation that communicates OSU's accomplishments and conveys its culture. The work plan will be refreshed and updated now that SP4.0 has been adopted.

**Diversity Planning**

Since OSU articulated five core institutional values — accountability, diversity, integrity, respect and social responsibility — in Strategic Plan I, these values have been fundamental to the university’s success. Each value has a prominent role in each of the institution’s subsequent strategic plans.

Alongside the development of SP4.0, the university further established its commitment to the value and importance of diversity by developing a university-wide diversity strategic plan, *Innovate & Integrate: Plan for Inclusive Excellence.* The development and implementation of the diversity strategic plan is a key step toward the realization of OSU’s vision to become a national model for inclusive excellence. The plan serves as a road map to advance inclusive excellence by leveraging existing successful initiatives and embracing new ideas.

Oregon State’s planning and progress toward Vision 2030 is shown in Figure 3.A.1.
University Planning Snapshot: Progress Toward Vision 2030

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NWCCU Self-Evaluation Report  |  2019

PLANNING AND IMPLEMENTATION

Figure 3.A.1: University Planning Snapshot

Annual goals, objectives, tactics, outcomes

Focus on Excellence SP3.0 | 2014-18

Transformation, Excellence and Impact SP4.0 | 2019-23

Transformation, Excellence and Impact SP5.0 | 2024-28

Development of Vision 2030 2019 Accreditation Site Visit

Annual admissions cycle planning

2014 Accreditation Year Three Report 2019 Accreditation Year Seven Report

Diversity Strategic Plan | 2018-23

Transformation, Excellence and Impact SP4.0 | 2019-23

Diversity Strategic Plan | 2024-28

Annual budget plans


Strategic Enrollment Management Plan

2019-23

Strategic Enrollment Management Plan

2024-28

Strategic Enrollment Management Plan

10-Year Business Forecast 2018-28

College and Admin

Annual admissions cycle planning

Annual budget plans

2014 Accreditation Year Three Report

2019 Accreditation Year Seven Report

2020 Mission and Core Theme Report

2023 Mid-cycle Self-Evaluation Report

2027 Accreditation Year Seven Report

Development of Vision 2030 2019 Accreditation Site Visit
### Exhibits 3.A.1

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### 3.A.2 Broad-Based Comprehensive Planning

The institution’s comprehensive planning process is broad-based and offers opportunities for input by appropriate constituencies.

Development of OSU’s fourth strategic plan under President Edward Ray’s leadership occurred during the 2017-18 academic year. The engagement and planning process assessed what had been accomplished since the first plan (2004-08), refined areas of strategic focus, identified and modified campus-level goals as needed, considered current opportunities and challenges, and sought to inform the prioritization of actions and investments during the next five years.

This cycle of strategic planning was informed by the previous strategic plan, *SP3.0: Focus on Excellence*, the university’s recent rebranding effort, the university-wide accreditation self-study process, the newly-developed university-wide diversity strategic plan, and most importantly, input from hundreds of faculty, staff, students and other internal and external stakeholders. Strategic plan forum summaries are available online.

The new strategic plan also took into consideration the university’s recent visioning exercise, which sought to anticipate OSU’s future unique contributions on the higher education landscape. *Vision 2030: Distinction, Access and Excellence* articulates OSU’s promise, focus and distinction among premier
research institutions and describes the university’s commitment to provide access to a high-quality and affordable education for all learners and engage in world-class discovery, innovation and service within the university’s signature areas of distinction.

The Office of the Provost led the engagement and planning process for SP4.0, which was carefully designed to align with the university’s commitment to institutional planning and decision-making processes that honor shared governance. Over a period of several months, a steering committee, chaired by Senior Vice Provost Susan Capalbo, convened nearly 20 forums with the university community and stakeholders. More than 500 individuals participated during the engagement period. The resulting input helped to inform the draft content and structure, which was available for public comment and review. Similarly, led by the Office of Institutional Diversity, the diversity strategic plan was developed through an extensive engagement process that included numerous stakeholders who contributed their expertise and experience to the development of the plan.

Exhibits 3.A.2

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3.A.3 Data-Informed Comprehensive Planning

The institution’s comprehensive planning process is informed by the collection of appropriately defined data that are analyzed and used to evaluate fulfillment of its mission.

The adoption of SP4.0 will be followed by an annual assessment process that includes:

- Assessment of the university’s performance on a set of institutional metrics.
- Assessment of strategies to improve metrics or performance indicators.
- Setting performance targets for each metric for the following year.
- Establishing a dashboard to track outcomes.
- Reviewing strategies to decide whether to continue, update or sunset existing programs or introduce new strategies or initiatives.
- Sharing the outcome of the process with the university community and key stakeholders.

The collection and analysis of data are also important in the Board of Trustees’ annual review of the president. The board’s assessment consists of evaluating the president’s progress toward goals.
established by the board. By policy, the goals should be measurable and relate to the strategic plan. Current review metrics include measures from the university’s strategic plan and measures of quality identified by the university, including Presidential Review Metrics.

At the state level, the Higher Education Coordinating Commission (HECC) is responsible for an annual evaluation report of public universities in Oregon, including Oregon State University. Oregon’s criteria for evaluation are degree completions, equity across different populations, academic and research quality, and financial soundness. Numbers in the HECC report are based on student-level data provided by OSU’s Office of Institutional Research.¹

Institutional Research (IR) and the Business Intelligence Center (BIC) have been folded into a new unit — Institutional Analytics and Reporting (IAR) — to improve the efficiency, availability and consistency of data management and reporting for operations and planning.²

IAR is a key resource in providing institutional and major unit metrics, trend data and other analysis in support of OSU’s planning processes. It fulfills this role by extracting university administrative data and applying standard definitions to allow consistent comparisons and interpretations. IAR also provides consultation on standard reports to university units at all levels.

Data systems such as Data Warehouse have been available for administrative units to select and analyze their own data; however, there have been some limitations with data consistency, definitions and timeliness. BIC has developed new data reporting systems to allow units to pull timely, reliable data sets for internal analysis and detailed planning. The Common Open Reporting Environment (CORE) provides access to operational data, both for daily administrative needs and for detailed analysis.³ Using Tableau software, the university is creating dashboards to provide timely, standardized charts and trends that allow users quick access to key indicators and the ability to select important subgroups.

Unit-level planning includes review of prior-year goals, analysis of goal attainment, determination of barriers to success, and development of next-year goals. During the unit review process, units engage with or use information from constituencies related to the unit’s function. For example, academic departments may use results from student surveys to improve access to student support services.

Exhibits 3.3.A

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### 3.4 A.4 Priority-Driven Comprehensive Planning

The institution’s comprehensive planning process articulates priorities and guides decisions on resource allocation and application of institutional capacity.

Oregon State University has a longtime culture of active implementation of its strategic plans. The strategic plan and the accompanying plans developed by academic colleges and administrative units have been consistently used to guide decisions on the allocation of resources.
Annual financial plans for all colleges and administrative divisions add an additional layer to resource allocation efforts. The purpose of the financial plans is to articulate strategies and associated actions each college/division intends to undertake in the short-term (one to two years) and longer-term (three to five years) to maintain and strengthen its program of research and creative activity, instruction, and outreach and engagement. The expectation is that the strategies and actions outlined in the financial plan are consistent with those in the college/divisional strategic plans. Strategies and planned actions are linked to the financial plan, and these plans include a discussion of general hiring needs and plans.

The financial plans identify specific opportunities that, if captured, would significantly enhance the excellence of a college/division’s programs and build their strength relative to external competitors (e.g., programs at peer institutions that compete for students, faculty and research dollars). Examples of opportunities include: new initiatives to improve teaching quality and student satisfaction; new research funding streams that might be tapped with key hires or investments in research support or infrastructure; majors, minors, courses and other curricular changes with evidence of strong student demand; extracurricular activities that strengthen teaching programs and improve new student recruitment; online and hybrid courses that draw students and grow revenues; and strengthened alumni relations activity to improve advancement results.

The financial plans also discuss threats to the excellence of programs and activities that need to be addressed, including technological changes that have weakened existing job markets for graduates; low gender, racial or ethnic diversity of faculty, leading to lower quality of teaching programs and/or difficulty attracting a diverse pool of students; emergence of strong competitors for applicants; erosion of faculty salaries relative to peers; deteriorating, low-quality or inadequately sized facilities; and the departure of key faculty and/or staff.

As college deans and executive administrators consider opportunities and threats, they are asked to be mindful of university goals as articulated in the strategic plan. Financial plans also include specific strategies and associated actions a unit is implementing or will implement to capture opportunities and counter threats.

The Corvallis campus recently changed the Education & General (E&G) budget allocations to a new budget model to more clearly align the budget distribution for academic colleges with the goals identified in the strategic plan and to provide transparency of incentives for the work of the colleges. OSU-Cascades manages a similar budget model for academic programs and administrative units.

OSU has used historical (or incremental) budgeting for much of the E&G budget, though budgeting based on specific activities, such as Ecampus and summer teaching, have become an increasing portion of the annual budget. The University Budget Committee (UBC) considered alternatives and proposed moving to a modified or hybrid Responsibility Centered Management (RCM) budget distribution model. The shared responsibility budget model is a better fit for the culture and needs of OSU, as it encourages collaborative decisions for revenue generation, investments in services and academic programs, and development of cross-unit collaboration. The model attempts to clearly show the relation of budget allocations to the work of academic delivery units; activities of service, support and management units; and strategic, executive and financial stability requirements. OSU-Cascades has implemented a similar RCM model.

Exhibits 3.A.4

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3.A.5 Emergency Preparedness and Contingency Planning

The institution's planning includes emergency preparedness and contingency planning for continuity and recovery of operations should catastrophic events significantly interrupt normal institutional operations.

Oregon State University is committed to emergency preparedness in all aspects of operation, with solid contingency planning in place to deal with interruptions of normal operations. OSU created the Emergency Management Office\(^1\) in 2013 to facilitate decisive incident preparedness, mitigation, response and recovery. By incorporating an all-hazards approach, the university developed a comprehensive Emergency Operations Plan (EOP) to guide emergency responses for the broadest spectrum of incidents possible. The implementation of this EOP minimizes the negative effects an emergency may have on university operations, by identifying stakeholder responsibilities, outlining clear decision-making matrices during all phases of incident operations, and developing Incident Management Teams (IMT) and/or steering committees to lead response and recovery efforts. Additionally, emergency purchasing and contracting plans are in place to assist the IMT as it implements recovery efforts.

The Emergency Management Office also assists academic colleges and administrative units with custom development of their own internal plans. These unit-level emergency preparedness efforts have directly resulted in the development of improved plans to guide employees and leaders in incident preparedness, and response and recovery within their immediate operational areas. Both the institutional and unit-level emergency planning efforts follow a meticulous cycle of planning, training, exercising and revising plans.

OSU’s efforts include EOPs at all sites, including the campuses in Corvallis\(^2\) and Bend\(^3\) and the Hatfield Marine Science Center (HMSC)\(^4\) in Newport. Emergency action plans are documented for locations in Portland, and experiment stations and Extension offices across the state. Relationships with local community responders ensure familiarity of sites and enhance local response capabilities. Every location is responsible for managing its developed plans and programs to protect employees, students and visitors during an incident, using pre-established decision-making processes and well-prepared strategies for actively managing all phases of incident disruption. Policies, standard operating guidelines and procedures are developed and implemented for each site, along with incident- and hazard-specific plans and customized training. This ensures that incident preparedness, response and recovery is tailored for specific university locations and operations.

OSU has also developed focused response and recovery plans for several specialized areas. These include plans for the university’s nuclear reactor; chemical, biological and radiological laboratories; animal care and research; and student residence operations. Plans are reviewed by the appropriate governing committees and unit leadership to ensure planning, response and recovery activities are addressed. Additionally, the university’s Student Health Services (SHS) and Counseling and Psychological Services (CAPS) units have developed and coordinated response and recovery programs to assist students before, during and after incidents. As an overall strategy to minimize disruption and support the continuity of services, the university continues to expand its use of cloud computing. This includes course materials and departmental services and resources.

Additional activities inclusive of all sites:

- Adoption and implementation of the National Incident Management System (NIMS) principles and guidelines in the development of the university’s response and recovery program.
• Use of the Homeland Security Exercise and Evaluation Program (HSEEP) to develop, conduct and evaluate exercises and drills.

• Development of a Natural Hazard Mitigation Plan to address the impact of natural hazards on OSU infrastructure and identify future work needed to mitigate the effect of such hazards.

• Completion of hazard assessments to identify risks and mitigation activities to reduce the risk.

• Implementation of OSU Alert, an emergency notification system for all students and employees that can communicate by text, voice message and email. The system is used by the university to communicate crisis information and protective actions.

• Completion of annual Incident Management Team drills and exercises for hazards that could occur at OSU to develop teamwork and response and recovery implementation.

• Establishment of Incident Management Team training, including setting minimum training requirements and conducting training courses to increase the proficiency of members.

• Appointment of a steering committee with monthly meetings to review incidents, identify issues related to response and recovery, and identify efforts to further the capability of incident response and recovery.

• Completion of exercises and drills, which are conducted within departments or with response units to familiarize personnel and train teams in incident-related skills.

• Education of employees and students through actions such as conducting department-specific training, distributing preparedness topic information and conducting general evacuation training.6

• Use of an international travel registry designed to capture travel information for all faculty, staff and students traveling internationally for university-related activities such as courses, conferences, internships and research. All faculty, staff and students are required to register their university-related travel.6

Exhibits 3.A.5

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3.B.1 Core Theme Planning

Planning for each core theme is consistent with the institution's comprehensive plan and guides the selection of programs and services to ensure they are aligned with and contribute to accomplishment of the core theme's objectives.

Oregon State University's core themes are mapped directly to the institution's strategic plans. As noted in standards 3.A.1-4, OSU has developed a culture of strategic planning that includes defining a clear set of goals with measurable performance indicators linked to the institutional mission. This is reflected in the process and outcomes associated with completion of Strategic Plan I in 2004, Strategic Plan II in 2009, Strategic Plan 3.0 in 2014, and the recently developed and approved Strategic Plan 4.0. The NWCCU introduced an explicit focus on core themes when standards were revised. The idea of a set of core themes influenced OSU's decision in 2009 to undergo the 2010-11 accreditation under the new NWCCU standards, and the focus on core themes continues to resonate with the approach and structure used for the strategic planning process and this self-evaluation report.

3.B.2 Core Theme Programs and Services

Planning for core theme programs and services guides the selection of contributing components of those programs and services to ensure they are aligned with and contribute to achievement of the goals or intended outcomes of the respective programs and services.

Several criteria have been considered in developing and refining OSU’s current three core themes:

- **Ensure the core themes are consistent with the key dimensions of the university's mission as a premier land grant research university.** This is important not only for minimizing duplication of planning and assessment efforts across the institution, but more importantly to ensure that OSU is planning and reporting to NWCCU, professional accreditation agencies and other relevant entities are closely aligned.

- **Ensure the objectives for each core theme are consistent with the strategies and initiatives that have been introduced in current university-wide planning framework(s) and reflect the directions that OSU is pursuing for the next decade.** While it is expected that the development of core themes will highlight additional objectives and areas of attention, streamlining the institution’s time, effort and energy is also important in this process.

- **Understand and communicate the relationship between the university’s overarching goals defined in its strategic plans and the core themes.** The three strategic goals in SP3.0 and a commitment to distinctive academic programs and excellent student learning environments are embodied in each of the three core themes.
• Leverage the progress made under SP3.0 and the strategic planning for the next five-year period in SP4.0. As the university prepared for the development of SP4.0, the provost appointed a steering committee consisting of faculty, staff and administrators to review SP3.0, the NWCCU accreditation reports and core themes, and the Vision 2030 document. The charge to the steering committee was to carefully review and assess the current priorities and action items including OSU’s mission, vision and signature areas of distinction. The committee designed the engagement process and led the campus and stakeholder meetings, summarized and synthesized input and worked with the senior leadership to create the final draft of SP4.0.

The celebration of OSU’s 150th anniversary, the establishment of the Office of Institutional Diversity, the timing of development of Vision 2030, SP4.0 and the self-study for NWCCU accreditation are fortuitous. The past year has been a time for review and thinking broadly about the university’s future and the role of OSU as a premier land grant university. The steering committee for SP4.0 was chaired by the senior vice provost, who is also the accreditation liaison officer for OSU. The director of the Office of Institutional Diversity sat on the SP4.0 steering committee. The engagement process for SP4.0 included nearly 20 public forums with students, staff, faculty, administrators and external stakeholders. One of these forums was streamed with call-ins available. Forum notes were shared with the campus community via the provost’s website and included opportunities for web-based feedback. The chair of the steering committee and the provost presented a synthesis of the key ideas, concerns and priorities at a final campus forum, and reconvened the steering committee for a final distillation of input and proposed refinements. The final draft plan was shared with OSU leadership, posted on the provost’s website and approved at the OSU Board of Trustees’ meeting in late October 2018. Metrics and dashboards will be refined in conjunction with the deans and senior leadership of the university.

3.B.3

Core theme planning is informed by the collection of appropriately defined data that are analyzed and used to evaluate accomplishment of core theme objectives. Planning for programs and services is informed by the collection of appropriately defined data that are used to evaluate achievement of the goals or intended outcomes of those programs and services.

Oregon State University selected three core themes, consistent with the three dimensions of its mission, for implementation:

• Undergraduate Education
• Research and Graduate Education
• Outreach and Engagement

The selection of the core themes was based on conversations that involved university leadership, the Provost’s Council of Deans, Provost’s Senior Leadership Team, Faculty Senate, Faculty Senate Executive Committee and the Accreditation Steering Committee. Once the core themes were selected, the Accreditation Steering Committee convened faculty groups to review objectives and institutional indicators, revise where needed, evaluate whether the evidence indicated satisfactory attainment of core theme objectives, and recommend future actions. The themes were carried over from the previous three strategic plans. Colleges and units were involved in collecting data to evaluate objectives. Since this is the first completed cycle under the new NWCCU accreditation cycle, significant effort has been spent to define
and collect evidence for the indicators and make a definitive conclusion on success meeting performance
goals for some of the less easily quantified indicators. In many cases, performance targets were not defined,
as they have been for institutional metrics that have been measured and reported for several years.

Core Theme 1, Undergraduate Education, is a critical component of OSU’s mission, performance and
accountability. It is also the core theme that is most important and visible to the people of Oregon. This
remains one of the goals of SP4.0, and it is a priority among the commitments in Vision 2030. Within
Core Theme 1 is an emphasis on growth of a diverse student population, development of programs that
support student success and leadership, and recognition that student learning is dynamic and depends
on both classroom and experiential opportunities, as well as learning enhanced by technology and
online learning components. There is strong linkage to research and scholarship as foundational to the
curriculum and programs that better meet students’ and employers’ needs.

OSU’s undergraduate student population has increased significantly over the past few years. The
university is investing considerable resources and efforts to attract a high-achieving, diversified student
body and to ensure their success through first-year retention and six-year graduation rates.

Core Theme 1 has the following objectives:

• Provide broad and continuing access to undergraduate university degrees for the people of Oregon
  and beyond.

• Provide rigorous and effective undergraduate degree programs.

• Provide a supportive and healthy learning environment for student success and leadership
development at all levels.

• Use faculty research and scholarship to enrich the undergraduate curriculum.

Core Theme 2, Research and Graduate Education, reflects the importance of graduate education in
a comprehensive, research-intensive university, as well as the strong interplay between research and
graduate education, and the importance of a research-informed curriculum within undergraduate
programs. An important element of OSU’s mission is to educate future generations of scientists,
researchers and teachers. Many graduate programs are ranked among the top programs in the United
States and internationally. The university’s research commitments to the three signature areas of
distinction that were first identified in the early strategic plans remain steadfast and bold. Over the past
seven years, the university has recognized the strength and results of a research-infused undergraduate
curriculum. It is one of the hallmarks of an OSU education: integrating research and experiential learning
into both undergraduate and graduate programs. Within Core Theme 2 there is a strong emphasis on
OSU’s strategic strengths in research and scholarship, the collaborative strength of the institution in all
areas of research, and the engagement with graduate and undergraduate students.

Aggressive and impactful growth in the breadth and depth of research funding — through extramural
grants and contracts and through creative public-private partnerships — is a key focus for the institution.
Research expenditures and success with external grants have continued a strong upward trajectory. To
further complement growth in the graduate student body and to attract and retain diverse graduate
students, OSU has several graduate fellowship and scholarship programs to competitively attract graduate
students to its research programs. The university's research enterprise and scholarship programs have
funded both graduate and undergraduate students and are among the differentiators of an OSU education.

Core Theme 2 has the following objectives:
• Create and maintain a diverse research and scholarship environment that consistently achieves high impacts.
• Attract, retain and support high-quality and diverse students for graduate programs.
• Provide high-quality training to support graduate students’ degree completion and prepare them for post-graduation opportunities.

Core Theme 3, Outreach and Engagement, embodies the original land grant mission of the university — to engage the people of Oregon with research-based knowledge and education that focus on strengthening communities and economies, sustaining natural resources, and promoting healthy families and individuals. Beyond Oregon, OSU’s outreach and engagement efforts are focused on providing access to relevant, in-demand educational programs to people, businesses and communities globally, particularly through degrees and other educational programs offered online and via hybrid learning through Ecampus. Within Core Theme 3, there is a greater emphasis on access and availability of the university’s programs and a focus on the relevance of these programs to a diverse set of stakeholders.

Core Theme 3 has the following objectives:
• Extend transformative educational experiences to learners, communities and organizations using means beyond traditional classroom-based instruction.
• Increase collaboration with communities and stakeholders to build and sustain mutually beneficial and reciprocal relationships to advance learning, research and engagement opportunities.
• Increase the impact of outreach and engagement activities, economic development and quality of life throughout Oregon and beyond.

Members of the Accreditation Steering Committee, appointed by the provost, were intentionally selected to review core themes and accompanying objectives and indicators, work with the campus community to educate them on the new terminology and concept, and help the community to embed them in educational content and processes. The Accreditation Steering Committee membership is composed of:
• Susan Capalbo, Senior Vice Provost, Faculty Affairs, Accreditation Steering Committee Chair and Accreditation Liaison Officer
• Stephanie Bernell, Associate Dean, Graduate School
• Steven Clark, Vice President, University Relations and Marketing
• Debbie Colbert, Board of Trustees Secretary
• Robert Cowen, Director, Hatfield Marine Science Center
• Jon Dolan, Interim Vice Provost, Information and Technology
• Alix Gitelman, Vice Provost, Undergraduate Education
• Michael Green, Vice President, Finance and Administration
• Julie Greenwood, Associate Provost, Transformative Learning
• Carlos Jensen, Associate Dean and Associate Professor, College of Engineering
• Becky Johnson, Vice President, OSU-Cascades
• Dan Larson, Interim Vice Provost, Student Affairs
• Robert Mason, Professor, College of Science
• Dwaine Plaza, Faculty Senate President-Elect and Professor, College of Liberal Arts
• Scott Reed, Vice Provost, University Outreach and Engagement
• Staci Simonich, Associate Vice President, Research
• Aiden Tariku, Vice President, ASOSU
• Susan Tornquist, Dean, Carlson College of Veterinary Medicine
• Irem Tumer, Interim Vice President, Research
• Gigi Bruce, Special Assistant to the Provost and Executive Vice President (ex officio)
• JoAnne Bunnage, Director, University Accreditation (ex officio)
• Salvador Castillo, Director, Institutional Research (ex officio)
• Sara Daly, Executive Assistant to the Senior Vice Provost (ex officio)
• Michelle Klotz, Faculty Affairs Associate (ex officio)
• Emilie Ratcliff, Accreditation Assistant (ex officio)
OSU SPOTLIGHT: OFFICE OF INSTITUTIONAL DIVERSITY

The Office of Institutional Diversity (OID) opened in 2015 to plan, lead and implement — in collaboration with university partners — institutional change actions and initiatives to advance diversity, equity and inclusion throughout all facets of OSU. To monitor progress toward OSU’s vision to become a national model in higher education for outstanding engagement with and inclusion of the rich diversity of its community, the office developed a strategic plan, Innovate & Integrate: Plan for Inclusive Excellence. Launched in 2018, the plan describes five key goals:

1. Integrate and advance inclusive excellence within all aspects of the university.
2. Improve recruitment of students and employees from underrepresented communities.
3. Create an inclusive university climate to support the retention and success of all students and employees.
4. Provide innovative and transformative learning experiences enabling all students and employees to advance inclusive excellence.
5. Communicate OSU’s accomplishments, initiatives and innovations as the university advances inclusive excellence.

The campus climate for students, faculty and staff alike is continually assessed through the distribution of campus climate surveys. OID also supports the increased visibility of the Association of Faculty and Staff for the Advancement of People of Color (AFAPC), an organization that works to recruit, retain, build community and provide support for faculty and staff of color at OSU. Additionally, OSU received for the first time in 2018 the Higher Education Excellence in Diversity (HEED) award from INSIGHT into Diversity, the oldest and largest diversity-focused publication in higher education.

The Office of Institutional Diversity has reconfigured the work of the President and Provost’s Leadership Council on Equity, Inclusion and Social Justice to review and recommend student, faculty and staff recruitment; retention policies; and institutional bias data — all with the goal of advancing and implementing a welcoming environment for everyone. Diversity dashboards have been completed to leverage and make visible existing institutional data to inform and advance key strategic diversity, equity and inclusion priorities.
CHAPTER 4:
Effectiveness and Improvement
The institution regularly and systematically collects data related to clearly defined indicators of achievement, analyzes those data and formulates evidence-based evaluations of the achievement of core theme objectives. It demonstrates clearly defined procedures for evaluating the integration and significance of institutional planning, the allocation of resources and the application of capacity in its activities for achieving the intended outcomes of its programs and services and for achieving its core theme objectives. The institution disseminates assessment results to its constituencies and uses those results to effect improvement.

**Eligibility Requirements**

**Eligibility Requirement 22 — Student Achievement:**
Oregon State University is committed to the integrity, quality and structure of its curricular programs and publishes program student learning outcomes for all degrees and certificates on applicable program websites. Each undergraduate and graduate academic program must submit an annual report describing how the program is conducting full-cycle assessments of student learning outcomes.

**Eligibility Requirement 23 — Institutional Effectiveness:**
With oversight from the Office of the Provost and Executive Vice President, OSU’s Office of Institutional Analytics and Reporting (IAR) develops and regularly analyzes university strategic indicators and performance measures, maintains data archives, generates data using survey instruments, conducts research on issues of strategic importance and responds to federal, state and other requests for institutional data. OSU applies clearly defined evaluation and planning procedures to every aspect of its operations, then publishes results as applicable, to include assessments regarding the success of its mission and core themes. This information is also made available to the Board of Trustees, faculty and staff, as well as the student body.

### 4.A ASSESSMENT AND 4.B IMPROVEMENT

**4.A.1**

The institution engages in ongoing systematic collection and analysis of meaningful, assessable and verifiable data — quantitative and/or qualitative, as appropriate to its indicators of achievement — as the basis for evaluating the accomplishment of its core theme objectives.

Oregon State University relies on a combination of quantitative and qualitative data to support comprehensive institutional planning efforts, develop an integrated understanding of its performance and operations, and evaluate its core themes. The offices of Institutional Analytics and Reporting (which includes Institutional Research), Budget and Fiscal Planning, Enrollment Management, Research, Academic Programs and Assessment (APA), along with the divisions of Student Affairs and Outreach and Engagement, all play important roles in systematic data collection, verification and analysis.
As described in Chapter 3, the university has dramatically increased its focus on institutional analytics and business intelligence. To inform leadership decisions and provide strong support to institutional work, including assessment, the Office of Institutional Analytics and Reporting (IAR) was created to provide access to actionable and accurate information, as well as lead the campus to organize, strengthen, and advance institutional reporting, analytics and data literacy. IAR brought together the Office of Institutional Research, the Business Intelligence Center and the Data Reference Desk to create a powerful, synergistic approach for collecting and analyzing data.

OSU is committed to rigorous, data-informed program assessment and performance evaluation, as well as a self-assessment process that identifies successes and areas for improvement. The university uses a transparent system for sharing the process and outcomes with the campus community and its external constituents.

Since the inception of Strategic Plan 3.0 (SP3.0), the university has focused particularly on:

- Providing a transformative educational experience for all learners
- Demonstrating leadership in research, scholarship and creativity while enhancing preeminence in its three signature areas:
  - Advancing the science of sustainable Earth ecosystems
  - Improving human health and wellness
  - Promoting economic growth and social progress
- Strengthening its impact and reach throughout Oregon and beyond

SP3.0 has a strong commitment to inclusivity and diversity. Enhancing the diversity of the OSU community is essential to attaining excellence in the university’s teaching, research and outreach and engagement endeavors and to prepare students to succeed in a globally connected world.

The core themes, described in detail in Chapters 1 and 3, were chosen to represent the three dimensions of the university’s mission: teaching, research and outreach and engagement. Objectives and associated indicators were selected to align existing institutional goals, objectives and performance metrics found in SP3.0.

Many of the yardsticks the university uses to articulate mission fulfillment are also university metrics for tracking strategic planning progress, accomplishments and impacts. These yardsticks are noted with an asterisk in the Mission Fulfillment Yardsticks Table introduced in Chapter 1 and discussed in Chapter 5.

**Progress on SP3.0 Goals**
Over the past five years, the institution has made significant strides as tracked by the set of university strategic metrics that are reported in Table 4.A.1.
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<tbody>
<tr>
<td>Degrees Awarded — Total</td>
<td>4,113</td>
<td>4,232</td>
<td>5,256</td>
<td>5,891</td>
<td>6,025</td>
<td>6,387</td>
<td>6,807</td>
<td>7,123</td>
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<td>2019</td>
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<tr>
<td>Bachelor's Degrees</td>
<td>3,078</td>
<td>3,267</td>
<td>4,157</td>
<td>4,702</td>
<td>4,803</td>
<td>5,084</td>
<td>5,416</td>
<td>5,809</td>
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<tr>
<td>Master's Degrees</td>
<td>760</td>
<td>674</td>
<td>746</td>
<td>848</td>
<td>871</td>
<td>942</td>
<td>991</td>
<td>936</td>
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<tr>
<td>Doctoral Degrees</td>
<td>172</td>
<td>173</td>
<td>213</td>
<td>196</td>
<td>211</td>
<td>210</td>
<td>273</td>
<td>242</td>
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<tr>
<td>First Professional Degrees</td>
<td>103</td>
<td>118</td>
<td>140</td>
<td>145</td>
<td>140</td>
<td>151</td>
<td>127</td>
<td>136</td>
<td>-</td>
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<tr>
<td>Degrees Awarded per 5 year lagged enrollment X 1,000</td>
<td>308.9</td>
<td>223.2</td>
<td>258.9</td>
<td>268.4</td>
<td>253.7</td>
<td>255.9</td>
<td>258.2</td>
<td>255.3</td>
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<tr>
<td>Degrees Awarded — OSU-Cascades</td>
<td>22</td>
<td>108</td>
<td>210</td>
<td>262</td>
<td>313</td>
<td>369</td>
<td>325</td>
<td>361</td>
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<tr>
<td>Ecampus Degree-Seeking Enrollment</td>
<td>162</td>
<td>593</td>
<td>1,854</td>
<td>2,424</td>
<td>2,890</td>
<td>3,591</td>
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<tr>
<td>Doctoral Degrees Awarded</td>
<td>172</td>
<td>173</td>
<td>213</td>
<td>196</td>
<td>211</td>
<td>210</td>
<td>273</td>
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<tr>
<td>First-Year Retention Rate</td>
<td>80.7%</td>
<td>81.3%</td>
<td>83.3%</td>
<td>84.2%</td>
<td>83.8%</td>
<td>84.8%</td>
<td>83.4%</td>
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</tr>
<tr>
<td>Six-Year Graduation Rate — All Students</td>
<td>60.5%</td>
<td>60.9%</td>
<td>60.4%</td>
<td>61.5%</td>
<td>63.1%</td>
<td>64.3%</td>
<td>63.3%</td>
<td>67.0%</td>
<td>67.0%</td>
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<tr>
<td>Junior Transfer Four-Year Graduation Rate</td>
<td>72.6%</td>
<td>67.7%</td>
<td>63.8%</td>
<td>61.6%</td>
<td>62.4%</td>
<td>63.7%</td>
<td>57.1%</td>
<td>56.1%</td>
<td>72.0%</td>
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<tr>
<td>High-Achieving Oregon High School Graduates**</td>
<td>30.9%</td>
<td>32.7%</td>
<td>40.3%</td>
<td>39.6%</td>
<td>44.1%</td>
<td>41.4%</td>
<td>47.0%</td>
<td>-</td>
<td>45.0%</td>
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<tr>
<td>Domestically Underrepresented Students</td>
<td>13.5%</td>
<td>15.0%</td>
<td>19.7%</td>
<td>20.6%</td>
<td>21.9%</td>
<td>22.8%</td>
<td>23.7%</td>
<td>24.8%</td>
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<tr>
<td>International Students</td>
<td>6.0%</td>
<td>4.7%</td>
<td>8.9%</td>
<td>10.2%</td>
<td>11.1%</td>
<td>11.3%</td>
<td>11.6%</td>
<td>11.5%</td>
<td>15.0%</td>
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<tr>
<td>Total R&amp;D Expenditures (in millions)</td>
<td>$207.2</td>
<td>$233.4</td>
<td>$232.7</td>
<td>$230.9</td>
<td>$245.3</td>
<td>$254.2</td>
<td>$270.2</td>
<td>Feb 2019</td>
<td>$270.0</td>
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<tr>
<td>Industry Dollars as a Percent of R&amp;D Expenditures</td>
<td>1.3%</td>
<td>1.4%</td>
<td>2.8%</td>
<td>3.8%</td>
<td>4.0%</td>
<td>3.7%</td>
<td>3.1%</td>
<td>Feb 2019</td>
<td>3.6%</td>
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<tr>
<td>Invention Disclosures</td>
<td>36</td>
<td>74</td>
<td>80</td>
<td>59</td>
<td>72</td>
<td>70</td>
<td>68</td>
<td>78</td>
<td>120</td>
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<tr>
<td>Licensing Revenue (in millions)</td>
<td>$1.5</td>
<td>$2.3</td>
<td>$6.3</td>
<td>$5.2</td>
<td>$10.1</td>
<td>$5.1</td>
<td>$4.1</td>
<td>$4.4</td>
<td>$10.9</td>
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<tr>
<td>Dollars Leveraged per Appropriated Dollar for Statewide Public Services Research</td>
<td>$1.89</td>
<td>$1.70</td>
<td>$2.66</td>
<td>$2.49</td>
<td>$2.51</td>
<td>$2.17</td>
<td>$2.00</td>
<td>$2.14</td>
<td>$3.00</td>
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<tr>
<td>Annual Private Giving (in millions)</td>
<td>$51.9</td>
<td>$91.1</td>
<td>$81.5</td>
<td>$96.9</td>
<td>$100.6</td>
<td>$99.3</td>
<td>$93.0</td>
<td>$110.4</td>
<td>$110.0</td>
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*This number has been updated since the university metrics were initially released.

**The high-achieving Oregon high school graduate metric was revised in 2017; the data corresponding to the new metric will be included in future strategic metric tables.
The table shows trends since the baseline in 2003-04 and aspirational targets to elevate OSU’s performance and impact. The aspirational targets are informed by assessments of the opportunities and challenges facing the institution at the start of the strategic planning cycle, given OSU’s distinctive land grant mission within the higher education landscape.

OSU exceeded its aspirational target for total degrees awarded, and enrollment grew in all modalities at all levels, both in Corvallis and at OSU-Cascades. The institution met the research and development expenditures target in 2016-17; the 2017-2018 period is projected to be another outstanding year for Research and Development (R&D) expenditures and for R&D expenditures per tenured/tenure-track faculty member; and the number of Ph.D.s awarded has steadily grown and surpassed the aspirational goal in 2016-17. Service to nontraditional, mostly adult learners exceeded expectations significantly: enrollment in Ecampus programs by degree-seeking students is up 88 percent since 2013-14 and exceeds the target by 50 percent.

OSU has identified a need to diversify the student population, retain first-year students, and reduce the time to graduation for all student cohorts as fundamental to mission fulfillment as well as to strategies to elevate performance and impact. The first-year retention rates for incoming, first-time degree-seeking students increased modestly over the SP3.0 time frame but are less than the aspirational target of 88 percent. However, six-year graduation rates have increased steadily, and the 2018 graduation rate meets the target of 67 percent. The university’s share of domestically underrepresented students increased to 24.8 percent in 2017-18, while the share of international students plateaued at 11.5 percent. OSU continues to attract a larger share of high-achieving Oregon high school students, with the rate in 2016-17 achieving the target of 47 percent.

4.A.2

The institution engages in an effective system of evaluation of its programs and services, wherever offered and however delivered, to evaluate achievement of clearly identified program goals or intended outcomes. Faculty have a primary role in the evaluation of educational programs and services.

The university rigorously assesses its engagement as related to all aspects of the institutional mission, including teaching and learning, research and scholarship, and outreach and engagement. Data for and examples of indicators of achievement were collected for each objective, synthesized by accreditation committees and evaluated by faculty groups. The reviewers were asked to evaluate each objective as well as the corresponding set of indicators, and in the spirit of continuing progress, they were also asked to identify needed improvements, regardless of the level of achievement.

OSU’s academic programs are subject to thorough assessment, as indicated in Chapter 2, Section C. This section also describes how the Baccalaureate Core has undergone comprehensive review, leading to recommendations for improvements. Undergraduate programs also undergo a periodic review process involving external evaluators to ensure they are relevant, comply with identified goals and meet all student learning outcomes-based assessment needs. Graduate programs also undergo periodic reviews, a process that involves external evaluators. Summaries for all undergraduate and graduate program reviews are included in the appendices for Chapter 2, Section 2.C. All undergraduate and graduate programs are required to participate in program-level student learning outcomes assessments, and all programs are in compliance.
All new courses or redesigned courses must have student learning outcomes clearly visible on syllabi to be approved in the course approval process. The university's minimum syllabus requirements include the requirement that course-specific, measurable student learning outcomes be included. In addition, syllabi for courses in the Baccalaureate Core must also contain Baccalaureate Core learning outcomes.

Newly developed and redeveloped Ecampus courses undergo course design assessment prior to course development funding being disbursed. Ecampus subscribes to Quality Matters (QM), a nonprofit organization that provides a continuous improvement model for assuring the quality of online and hybrid courses through a collegial faculty review process. QM publishes a rubric of course design standards that are based on research. All Ecampus course designs must meet Ecampus Essential Standards, which are largely informed by QM standards. Ecampus supports faculty who choose to pursue formal QM certification of their courses with internal pre-reviews, assistance with course modifications and coordination of formal reviews. QM reviews are conducted by trained, experienced online educators. QM review teams include at least one reviewer external to OSU. More than 70 Ecampus courses have been QM-certified to date.

Educational services and resources are addressed in Chapter 2, Section D. As demonstrated in this section, all programs are subject to a thorough assessment. For new activities, mechanisms are defined for continuous assessment. User-based groups advise administrators and implementers, and both formal mechanisms and informal communication with faculty and staff help identify areas for improvement. Faculty members play a primary role in assessment and evaluation of academic programs and support functions at OSU. For academic programs, faculty are responsible for defining and leading the assessment and evaluation processes, evaluating outcomes and making recommendations to college administrators and the provost for areas of improvement and follow-up, as well as working with administrators and other faculty to enhance their programs. For academic support functions, faculty are involved in the evaluation processes and are asked by university administration to lead program reviews. Through their involvement, faculty help shape support services and programs to ensure they are best aligned with the needs of students and the university community.

In conjunction with academic programming, OSU Libraries and Press (OSULP) are at the center of intellectual engagement and scholarship at the university. As such, the libraries also report on external and internal assessment as a part of their annual progress report for their five-year strategic plan.

The Research Office (RO) also began benchmarking its structure and operations against peers in fall 2018 by gathering input from research staff and faculty and university stakeholders, along with reviewing feedback on the OSU research enterprise assembled through the Strategic Plan 4.0 (SP4.0) development process. This effort will be ongoing, but results to date have suggested a number of ways that faculty can be better supported in their research activities. The assessment of research facilities and laboratories and their impact on faculty research productivity and funding is continuous, resulting in plans to address challenges and opportunities.

Research centers, institutes and core facilities are reviewed every five years, or at any time as requested by the center or institute’s advisory board, the vice president for research or the provost and executive vice president. Review procedures established by the RO in collaboration with academic leaders and faculty guide the review process.

Through the Carnegie Engagement Classification process, the university engages in a self-reflection process similar to the accreditation self-study process. The outcome is an evidence-based documentation of community-engaged practices statewide. The Carnegie classification is not simply a prestigious
EFFECTIVENESS AND IMPROVEMENT

The Carnegie classification ensures a thorough self-assessment of outreach and engagement efforts, an alignment of engagement practices across teaching and learning, research and outreach, and a continuation of the university's engaged institutional identity, which is core to its mission as a land grant institution.

As described above, faculty evaluated the objectives for each core theme. The evaluations situated the objectives associated with OSU's three core themes as guides in pursuit of the three goals articulated in SP3.0. The strategies and metrics identified in SP3.0, along with the indicators of achievement detailed in the core themes aligned with accreditation standards, form the basis for the core theme assessments. The evaluations identified several objectives needing improvement as described in Section 4.C. The results were shared with the campus community via a series of forums and meetings, as well as through the University Accreditation website. The first version of the process resulted in refining some indicators to ensure they are better aligned with outcomes and that the data-collection process is feasible.

The first cycle evaluation of core themes has identified data-collection gaps and areas that need attention and increased investment. Areas of attention include close monitoring and follow-up to activities that have been initiated to improve retention and graduation rates, advance research and scholarship and increase outreach and engagement.

4.A.3

The institution documents, through an effective, regular and comprehensive system of assessment of student achievement, that students who complete its educational courses, programs and degrees — wherever offered and however delivered — achieve identified course, program and degree learning outcomes. Faculty with teaching responsibilities are responsible for evaluating student achievement of clearly identified learning outcomes.

4.B.2

The institution uses the results of its assessment of student learning to inform academic and learning-support planning and practices that lead to enhancement of student learning achievements. Results of student learning assessments are made available to appropriate constituencies in a timely manner.

While Oregon State University invested resources over several years to create a structure to support and ensure that all academic units participate in a comprehensive assessment process with full-cycle student learning outcomes assessment, it took many years and a cultural shift to reach a robust assessment framework that is embraced across the institution.

In 2014, the NWCCU requested that OSU submit an ad hoc report to address the following Peer Evaluation Report recommendation:

Recommendation 2: The committee recommends that the institution provide evidence that assessment data are used to revise educational programs (Standard 4.A.3).

In response to OSU’s 2015 ad hoc report, the NWCCU stated on February 5, 2016 that the university had met expectations with regard to Recommendation 2. See OSU Institutional Accreditation Reports and Responses.
Since 2016, OSU has continued to strengthen its annual assessment report review process and feedback loops. The university now has a well-developed culture of assessment whereby faculty with teaching responsibilities, in addition to professional faculty and staff who work with students, are responsible for evaluating student learning outcomes. Various aspects of program assessment are addressed in more detail in Chapter 2, Standard 2.C.

The Office of Academic Programs and Assessment (APA) provides a thorough overview of assessment practices, as well as access to assessment reports submitted to SharePoint, the online tracking system. This is a restricted-access website that serves as a repository of all assessment reports for university programs, including Baccalaureate Core category reviews, periodic academic program reviews and annual program-level assessment reports. OSU values the autonomy of each department, including the faculty’s expertise related to establishing standards of competence for students in their discipline. Energy and resources are focused on facilitating the articulation and practice of evidence-based decision-making. To demonstrate this, each degree-granting program, including programs offered at OSU-Cascades, must submit an annual report describing how the program is conducting full-cycle assessment of student learning outcomes by April 15 of each year.

In addition to the annual program assessment and student learning outcome cycle, academic programs undergo comprehensive reviews which include the use of assessment data, analysis and reflection. OSU has achieved a 100 percent participation rate for annual program reviews.

4.A.4

The institution evaluates holistically the alignment, correlation and integration of programs and services with respect to accomplishment of core theme objectives.

4.A.5

The institution evaluates holistically the alignment, correlation and integration of planning, resources, capacity, practices and assessment with respect to achievement of the goals or intended outcomes of its programs or services, wherever offered and however delivered.

4.A.6

The institution regularly reviews its assessment processes to ensure they appraise authentic achievements and yield meaningful results that lead to improvement.

The integration of planning for each core theme and institutional planning is addressed in Chapter 3. The idea of core themes is consistent with the framework associated with the strategic planning process. Review of the university’s performance is completed each summer for the academic preceding academic year, and strategies for improvement and growth are defined for the upcoming year. Because the core themes map onto the university’s strategic goals, assessment of the core themes remains fully integrated with the university’s annual strategic plan review and assessment cycle, including data collection, analysis and reporting of core theme indicators.
Evaluation of the core themes and their objectives identifies what aspects of programs and services should be improved to support the recommendations resulting from the evaluation process. This in turn helps identify strategies for advancing core theme objectives and institutional goals and priorities.

Ongoing planning activities to fully integrate the results of continuing assessment of mission fulfillment are addressed in Chapter 5. The goal is to ensure appropriate corrective action is taken in a timely manner and that the university’s efforts lead to improved quality of education, increased collaborations for solving problems and identification of opportunities that can expand the university’s impact. Additionally, it is important that assessment and evaluation efforts are linked to planning and the distribution of financial, personnel and infrastructure resources. As explained in Chapter 5, OSU has established an effective system to link resource planning to priorities, outcomes and mission fulfillment.

Periodic review, critique and revision of assessment processes have long been a part of OSU’s institutional practice. The university has a record of reviewing its comprehensive assessments of academic programs, including alignment with strategic plan goals, core themes and NWCCU accreditation standards. Importantly, all of these activities are anchored in the Office of the Provost to ensure alignment among the various activities.

Assessment processes for program outcomes have undergone various modifications over the past seven years, with a continued focus on enhancing the quality of education and the student learning experience. OSU has established strong leaders in assessment practices through the University Assessment Council, which has developed into a culture of continuous improvement across campus. Additionally, Faculty Senate committees and councils, the Office of Academic Programs and Assessment (APA) and the Graduate School review annual reports, meet with academic unit representatives and collect supporting examples.

4.B.1

Results of core theme assessments and results of assessments of programs and services are: a) based on meaningful institutionally-identified indicators of achievement; b) used for improvement by informing planning, decision-making and allocation of resources and capacity; and c) made available to appropriate constituencies in a timely manner.

The following provides an overview and assessment of each core theme and its objectives and indicators of achievement. Also included are improvements and areas the university is seeking to strengthen. This assessment is used in Chapter 5, along with yardsticks, to articulate mission fulfillment.

CORE THEME 1 – UNDERGRADUATE EDUCATION

In pursuit of its mission and vision, OSU has identified as a central strategic plan goal the provision of a transformative educational experience for all learners. Pursuit of this goal is guided by a core theme focused on the undergraduate experience, which is at the crux of OSU’s mission. The four objectives delineating OSU’s implementation of the best undergraduate experience reflect a commitment to accessible learning opportunities, rigorous degree programs, supportive learning environments and innovative curricula. The 2014 Strategic Plan (SP3.0) detailed a number of strategies and metrics associated with promoting student success through learning experiences and outcomes that seamlessly integrate teaching and research efforts.
OSU offers accessible, rigorous and academically relevant education to learners in Oregon and beyond. The university's academic programs are externally reviewed on a regular cycle, and annual assessment of program-level student learning outcomes contribute to a culture of full-cycle assessment and continual attention to student success.

### Core Theme 1: Undergraduate Education

<table>
<thead>
<tr>
<th>Objectives</th>
<th>Indicators</th>
</tr>
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</table>
| **1.1:** Provide broad and continuing access to undergraduate university degrees for the people of Oregon and beyond. | 1.1.1 Applications, admittances and matriculations for first-time, full-time, degree-seeking college (“freshmen”) students and transfer students: Total, historically underrepresented, online (Ecampus) and OSU-Cascades  
1.1.2 Percent of degree-seeking undergraduates with high college expense to family income ratio  
1.1.3 Six-year graduation rates: Total, historically underrepresented students and Pell-eligible students  
1.1.4 First-year retention rates  
1.1.5 Bachelor’s degrees earned by historically underrepresented, Oregon resident, transfer and campus |
| **1.2:** Provide rigorous and effective undergraduate degree programs. | 1.2.1 Percent of active academic undergraduate programs with completed external academic program reviews  
1.2.2 Percent of undergraduate programs that have full-cycle student learning outcomes assessments  
1.2.3 Participation rates in experiential learning with a focus on internships, research, service learning and global learning  
1.2.4 Satisfaction with value of degree at time of graduation  
1.2.5 Percent of graduating seniors reporting immediate plans to work in their field of study or attend graduate school following graduation |
| **1.3:** Provide a supportive and healthy learning environment for student success and leadership development at all levels. | 1.3.1 Participation rates in first-year experience courses and retention rate of first-year experience course participants compared to non-participants  
1.3.2 Percent of degree-seeking undergraduates who identified two or more university representatives who helped them succeed at OSU  
1.3.3 Percent of degree-seeking undergraduates who indicated two or more campus student support resources that were accessible  
1.3.4 National Survey of Student Engagement (NSSE) Supportive Campus Environment Benchmarks |
Core Theme 1: Undergraduate Education

<table>
<thead>
<tr>
<th>Objectives</th>
<th>Indicators</th>
</tr>
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<tbody>
<tr>
<td>1.4: Use faculty research and scholarship to enrich the undergraduate curriculum.</td>
<td>1.4.1 Number of faculty-led study abroad programs</td>
</tr>
<tr>
<td></td>
<td>1.4.2 Examples of innovative curricula that incorporate faculty research and scholarship</td>
</tr>
<tr>
<td></td>
<td>1.4.3 Examples of faculty research that engages undergraduate students</td>
</tr>
<tr>
<td></td>
<td>1.4.4 Participation in undergraduate research</td>
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<tr>
<td></td>
<td>1.4.5 Examples of support for undergraduate student research</td>
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</table>

Objective 1.1: Provide broad and continuing access to undergraduate university degrees for the people of Oregon and beyond.

The first objective reflects OSU’s land grant mission and vision of embracing knowledge for the betterment of humankind. The five indicators of achievement within this objective seek to demonstrate that OSU is advancing student success, as measured by enrollment rates and degree completion, and enhancing an integrated learning environment that raises and equalizes retention and success of all learners.

Indicator 1.1.1: Applications, admittances and matriculations for first-time, full-time, degree-seeking college (“freshmen”) students and transfer students: Total, historically underrepresented, online (Ecampus) and OSU-Cascades

This indicator demonstrates OSU’s ability to attract new students from application to admission and enrollment. While national enrollment in higher education has generally declined, OSU has seen enrollment growth since 1997. As shown in Table 1.1.1A, since 2011 there has been sustained growth in total applications and admits, as well as a plateau in matriculations since 2013. Historically underrepresented student applications and admits have also seen sustained growth each year from 2011-2017. There has also been a general increase in matriculations among historically underrepresented students since 2011. Ecampus has more than doubled its applications, admits and matriculations since 2011. OSU-Cascades has seen extremely large growth, from 42 applications in 2011 to 524 in 2017.

Table 1.1.1A: First-Time, Degree-Seeking [Freshmen] Applications, Admittances and Matriculations by Historically Underrepresented Students, Online [Ecampus] and OSU-Cascades

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<tbody>
<tr>
<td>TOTAL</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Applications</td>
<td>12,237</td>
<td>12,413</td>
<td>14,005</td>
<td>14,144</td>
<td>14,192</td>
<td>14,765</td>
<td>15,081</td>
</tr>
<tr>
<td>Admits</td>
<td>9,404</td>
<td>9,674</td>
<td>11,209</td>
<td>11,105</td>
<td>11,251</td>
<td>11,588</td>
<td>11,998</td>
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<tr>
<td>Matriculations</td>
<td>3,595</td>
<td>3,641</td>
<td>3,994</td>
<td>3,910</td>
<td>3,810</td>
<td>4,012</td>
<td>3,969</td>
</tr>
<tr>
<td>Historically Underrepresented Students</td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Applications</td>
<td>1,623</td>
<td>1,674</td>
<td>1,996</td>
<td>2,170</td>
<td>2,347</td>
<td>2,702</td>
<td>2,812</td>
</tr>
<tr>
<td>Admits</td>
<td>1,054</td>
<td>1,125</td>
<td>1,436</td>
<td>1,541</td>
<td>1,616</td>
<td>1,827</td>
<td>1,939</td>
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<tr>
<td>Matriculations</td>
<td>380</td>
<td>393</td>
<td>447</td>
<td>489</td>
<td>481</td>
<td>541</td>
<td>540</td>
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</table>
Similarly, Table 1.1.1B demonstrates the growth in total applications, admits and matriculations in transfer students since 2011. Historically underrepresented student applications and admits have also seen overall growth from 2011 to 2017. Ecampus has more than doubled its transfer student applications since 2011. OSU-Cascades has seen growth in transfer student numbers as well, from 209 applications in 2011 to 356 in 2017.

Table 1.1.1B: Transfer Applications, Admittances and Matriculations by Historically Underrepresented, Online (Ecampus) and OSU-Cascades

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<tr>
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<tr>
<td>TOTAL</td>
<td></td>
<td></td>
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<tr>
<td>Applications</td>
<td>3,285</td>
<td>3,556</td>
<td>3,596</td>
<td>3,747</td>
<td>4,009</td>
<td>3,960</td>
<td>4,195</td>
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<tr>
<td>Admits</td>
<td>2,420</td>
<td>2,543</td>
<td>2,508</td>
<td>2,571</td>
<td>2,580</td>
<td>2,492</td>
<td>2,527</td>
</tr>
<tr>
<td>Matriculations</td>
<td>1,699</td>
<td>1,806</td>
<td>1,797</td>
<td>1,829</td>
<td>1,824</td>
<td>1,721</td>
<td>1,757</td>
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Historically Underrepresented Students

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</thead>
<tbody>
<tr>
<td>Applications</td>
<td>319</td>
<td>402</td>
<td>411</td>
<td>487</td>
<td>500</td>
<td>555</td>
<td>613</td>
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<tr>
<td>Admits</td>
<td>216</td>
<td>283</td>
<td>276</td>
<td>315</td>
<td>282</td>
<td>301</td>
<td>321</td>
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<tr>
<td>Matriculations</td>
<td>142</td>
<td>176</td>
<td>192</td>
<td>218</td>
<td>178</td>
<td>186</td>
<td>207</td>
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Ecampus

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</thead>
<tbody>
<tr>
<td>Applications</td>
<td>523</td>
<td>686</td>
<td>670</td>
<td>819</td>
<td>1021</td>
<td>1130</td>
<td>1234</td>
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<tr>
<td>Admits</td>
<td>345</td>
<td>407</td>
<td>377</td>
<td>466</td>
<td>512</td>
<td>537</td>
<td>547</td>
</tr>
<tr>
<td>Matriculations</td>
<td>258</td>
<td>280</td>
<td>277</td>
<td>343</td>
<td>364</td>
<td>411</td>
<td>396</td>
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</table>

OSU-Cascades

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</tr>
</thead>
<tbody>
<tr>
<td>Applications</td>
<td>209</td>
<td>313</td>
<td>331</td>
<td>299</td>
<td>321</td>
<td>294</td>
<td>356</td>
</tr>
<tr>
<td>Admits</td>
<td>164</td>
<td>257</td>
<td>257</td>
<td>225</td>
<td>239</td>
<td>229</td>
<td>241</td>
</tr>
<tr>
<td>Matriculations</td>
<td>116</td>
<td>156</td>
<td>169</td>
<td>139</td>
<td>171</td>
<td>163</td>
<td>164</td>
</tr>
</tbody>
</table>

Source: OSU Institutional Research

Indicator 1.1.2: Percent of degree-seeking undergraduates with high college expense to family income ratio

OSU aims to both keep costs reasonable and provide appropriate aid packages to maintain student and family contributions to attendance at reasonable levels relative to family income. As state funding has
fallen and costs have risen, OSU, like many other universities around the state and nation, has faced challenges related to access and affordability.

Data related to OSU’s ability to serve low-income students are shared with stakeholders university-wide, as well as with parents, students and high school counselors during the recruitment and admissions process. OSU also publishes student debt data by academic college and university-wide via an Enrollment Management website. Academic colleges use these data in their work with various stakeholders. As demonstrated in Figure 1.1.2, the trend in degree-seeking undergraduates with high college expense related to family income has increased substantially since 2011.

Figure 1.1.2: Percent of Degree-Seeking Undergraduates with High College Expense to Family Income Ratio

![Figure 1.1.2: Percent of Degree-Seeking Undergraduates with High College Expense to Family Income Ratio](image)

Source: OSU Institutional Research/Financial Aid data; student expense is financial aid student budget minus scholarships and grants; family income is adjusted annual gross family income.

**Indicator 1.1.3: Six-year graduation rate: Total, historically underrepresented students and Pell-eligible students**

Indicator 1.1.3 addresses degree completion and success of all learners. The six-year graduation rate for first-time, full-time entering students in fall term for each year has improved over the period from 2005 through 2011 (and therefore graduating 2011 through 2017). Measuring these increases against goals as outlined in SP3.0, the 2011 rate of 67 percent achieves the aspirational target for six-year graduation rates.

---

OREGON STATE UNIVERSITY
The number of OSU students from historically underrepresented groups, which has been small in the full-time, first-time student cohorts, has grown. Increased numbers, partly due to the university’s overall enrollment growth beginning in 2008, and also due to a commitment to expand opportunities for more students, has led to greater diversity, which is often matched by lower graduation rates.

For the most recent two cohorts of students, the six-year graduation rate gap between non-underrepresented groups and underrepresented groups decreased from a 15.5 percent gap for the 2010 cohort to a 9.8 percent gap for the 2011 cohort. The gap for Non-Pell- versus Pell-eligible students increased across these two cohorts, from a 5.8 percent gap for the 2010 cohort to a 10.4 percent gap for the 2011 cohort. This increased gap may in part be a product of the Great Recession, when larger numbers of Pell-eligible students chose to enter college rather than join the workforce.

**Indicator 1.1.4: First-year retention rates**

First-year retention rates are given in Tables 1.1.4A, 1.1.4B and 1.1.4C. The rate has hovered around 84 percent over the last five academic years, increasing from a low of 81 percent in 2011-12. OSU’s aspirational goal for this retention rate was 88 percent in SP3.0, and while the university has fallen short of that goal, several efforts are underway for improving this metric. These include the Undergraduate Student Success Initiative (USSI), which incorporates the Faculty Student Mentoring Program; the University Innovation Alliance (UIA); first-year experience courses; efforts by colleges to offer first-year experience courses; and research experiences for undergraduates through the Undergraduate Research, Scholarship and the Arts (URSA) program and the STEM Leaders program. In addition, a recent analysis of 2016-17 first-time, full-time freshmen cohort data shows a retention rate of 97 percent for students who complete at least 45 credits in their first year. Moreover, this holds true for first-generation college students and for students of color. By contrast, for first-time, full-time freshmen who complete fewer than...
45 credits in their first year, the retention rate is 78 percent overall, 73 percent for first-generation college students and 77 percent for historically underrepresented students.

In addition, an analysis of the same population of students showed that for those students who participated in at least one student affairs activity in their first year, the retention rate was 86 percent, compared to 73 percent for students who did not participate in any student affairs activity. These are striking differences, and they suggest clear pathways for OSU to increase first-year retention rates and, quite possibly, close the gaps in those rates across different subpopulations of students.

Table 1.1.4A: First-Year Retention Rates

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</thead>
<tbody>
<tr>
<td>First-year</td>
<td>81.4%</td>
<td>83.3%</td>
<td>84.2%</td>
<td>83.8%</td>
<td>84.8%</td>
<td>83.4%</td>
<td>84.4%</td>
</tr>
<tr>
<td>retention</td>
<td>rates</td>
<td>rates</td>
<td>rates</td>
<td>rates</td>
<td>rates</td>
<td>rates</td>
<td>rates</td>
</tr>
</tbody>
</table>

Figure 1.1.4B: Retention and Graduation Rates of First-Time, Full-Time Degree-Seeking Freshmen
Cohort: First-time college, full-time degree-seeking undergraduates admitted for fall term or preceding summer term.  
First-time: Never matriculated as degree-seeking students at another college or university.  
Full-time: Enrolled in 12 or more credits in first fall term.  
Retained: Enrolled in a subsequent fall term but not yet graduated.  
Graduated: Received first bachelor’s degree by the summer before the given following fall term.  
Example: 6-year graduation counts degrees earned up to the summer before the seventh fall term.

Figure 1.1.4C: Retention and Graduation Rates of First-Time, Full-Time Degree-Seeking Freshmen

Cohort: First-time college, full-time degree seeking undergraduates admitted for fall term or preceding summer term.
First-time: Never matriculated as degree seeking students at another college or university.
Full-time: Enrolled in 12 or more credit hours in first fall term.
Retained: Enrolled in a subsequent fall term but not yet graduated.
Graduated: Received first bachelor's degree by the summer before the given following fall term.
Example: 6-year graduation counts degrees earned up to the summer before the seventh fall term.

Indicator 1.1.5: Bachelor's degrees earned by historically underrepresented, Oregon resident, transfer and campus

OSU has worked to enhance an integrated learning environment that raises and equalizes retention and success for all learners. As shown in Table 1.1.5, total bachelor's degrees awarded have steadily increased to 5,809 in 2017-18. Currently, the number of bachelor’s degrees earned by historically underrepresented students increased as a percentage of total from 7.8 percent in 2011-12 to 9.8 percent in 2017-18. The number of bachelor's degrees earned by Oregon residents increased in number over this seven-year span to 68.2 percent in 2017-18. The total number of bachelor’s degrees for transfer-admit students increased steadily over the seven-year period, though the percentage of total degrees awarded to transfer students stayed at around 36 percent.

Bachelor’s degrees awarded for programs offered through Ecampus increased more than four-fold from 2011-12 to 2017-18, while degrees offered at OSU-Cascades more than doubled in the same time period.

Table 1.1.5: Bachelor’s Degrees Earned by Historically Underrepresented, Oregon Resident, Transfer and Campus

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</thead>
<tbody>
<tr>
<td>TOTAL</td>
<td>3,932</td>
<td>4,157</td>
<td>4,702</td>
<td>4,803</td>
<td>5,084</td>
<td>5,416</td>
<td>5,809</td>
</tr>
<tr>
<td>Bachelor’s</td>
<td>306</td>
<td>342</td>
<td>378</td>
<td>394</td>
<td>470</td>
<td>510</td>
<td>570</td>
</tr>
<tr>
<td>Historically Underrepresented Students</td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Oregon Resident</td>
<td>3,349</td>
<td>3,393</td>
<td>3,633</td>
<td>3,533</td>
<td>3,698</td>
<td>3,757</td>
<td>3,959</td>
</tr>
<tr>
<td>Bachelor’s</td>
<td>1,337</td>
<td>1,444</td>
<td>1,675</td>
<td>1,787</td>
<td>1,829</td>
<td>1,942</td>
<td>2,070</td>
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<tr>
<td>Transfer Admits</td>
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<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Corvallis</td>
<td>3,590</td>
<td>3,704</td>
<td>4,108</td>
<td>4,043</td>
<td>4,229</td>
<td>4,301</td>
<td>4,591</td>
</tr>
<tr>
<td>Bachelor’s</td>
<td>200</td>
<td>253</td>
<td>356</td>
<td>470</td>
<td>570</td>
<td>834</td>
<td>925</td>
</tr>
<tr>
<td>Ecampus</td>
<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bachelor’s</td>
<td>121</td>
<td>156</td>
<td>199</td>
<td>256</td>
<td>261</td>
<td>249</td>
<td>270</td>
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<tr>
<td>OSU-Cascades</td>
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<td></td>
</tr>
<tr>
<td>Bachelor’s</td>
<td>21</td>
<td>44</td>
<td>39</td>
<td>34</td>
<td>24</td>
<td>32</td>
<td>23</td>
</tr>
</tbody>
</table>

Source: OSU Institutional Research
Summary of Objective 1.1

As Oregon’s land grant university, OSU is deeply committed to providing access to high-quality educational experiences for all learners in Oregon and beyond. As the indicators for Objective 1.1 and Figure 1.1.4C show, this is done comprehensively by increasing access, which in turn may result in increasing graduation rates. The university is aware that more work needs to be done to support the success of students from historically underrepresented groups and Pell-eligible students. The goal is to improve first-year retention rates across all demographic groups in the continuing effort to improve six-year graduation rates across all demographic groups.

Objective 1.2: Provide rigorous and effective undergraduate degree programs.

Oregon State University has a long-standing commitment to providing rigorous and effective undergraduate degree programs. Strategic Plan 3.0 prioritized enhancing an integrated learning environment that seamlessly combines teaching and research efforts, advancing innovations in course design and making high-impact learning a hallmark of an OSU undergraduate education. Five indicators demonstrate OSU’s success in achieving this objective.

Indicators 1.2.1: Percent of active academic undergraduate programs with completed external academic program reviews

This indicator reflects OSU’s use of rigorous and transparent processes to review existing academic programs. All undergraduate and graduate programs at OSU undergo a comprehensive external Academic Program Review every 10 years. These Academic Program Reviews have led to significant findings and actions, largely because an action plan is required after each review to ensure that programs are held accountable for response to reviewers’ recommendations. Three years after each Academic Program Review, there is a follow-up with an assessment of progress on action plans. All documents generated during an Academic Program Review are securely archived electronically in the program’s SharePoint site located on the Office of Academic Programs and Assessment (APA) website.

Table 1.2.1 demonstrates the completion of 100 percent of external academic program reviews for active undergraduate programs since 2013-14. The number of undergraduate programs has increased from 80 in 2011-12 to 86 in 2017-18.

Table 1.2.1: Percent of Active Academic Undergraduate Programs with Completed External Academic Program Reviews

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</thead>
<tbody>
<tr>
<td>Total Approved</td>
<td>80</td>
<td>81</td>
<td>84</td>
<td>83</td>
<td>85</td>
<td>85</td>
<td>86</td>
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<tr>
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<td></td>
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<tr>
<td>Programs (Unique</td>
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<td>Majors)¹</td>
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<tr>
<td>Percent of Active</td>
<td>Joint</td>
<td>Joint</td>
<td>100%</td>
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<td>100%</td>
<td>100%</td>
<td>100%</td>
</tr>
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<tr>
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</table>

¹ This number represents approved undergraduate programs (both active and suspended programs).
² Percentage is based on the number of active undergraduate programs (does not include suspended programs). Joint = Conducted as part of a graduate academic program review and not tracked separately.
**Indicator 1.2.2: Percent of undergraduate programs that have completed full-cycle student learning outcomes assessments**

An annual program assessment report is submitted each spring term by every undergraduate, graduate and certificate program. Each program is expected to assess its program-level student learning outcomes at least once every five years. The assessment reports identifying the specific program-level learning outcome(s) that is (are), aligning outcomes with meaningful direct and indirect assessment measures and activities, collecting and analyzing data, reflecting on the analysis and using results to make informed and specific programmatic decisions or changes. Documenting full-cycle assessment through annual reporting means reporting on the components of the assessment from outcome to implemented action. This provides faculty the opportunity to reflect on the extent to which students, courses and programs are meeting defined learning or program outcomes. Data-driven changes occur that impact program outcomes and the intersection of assessment efforts with strategic planning and program, college and university missions.

Table 1.2.2 demonstrates that 100 percent of undergraduate programs submitted assessment reports in 2016-17 and 2017-18. This represents how assessment reporting processes are robust and integrated into the culture of the university. These numbers indicate that all programs are now participating in full-cycle assessment (i.e., they are submitting reports). OSU is not quite to 100 percent of programs achieving full-cycle assessment, meaning there remain a few programs that are not yet making positive changes to their programs in response to their assessments.

Table 1.2.2: Percent of Undergraduate Programs that have Full-Cycle Student Learning Outcomes Assessment

<table>
<thead>
<tr>
<th>Total Approved Undergraduate Programs (Unique Majors)</th>
<th>2011-12</th>
<th>2012-13</th>
<th>2013-14</th>
<th>2014-15</th>
<th>2015-16</th>
<th>2016-17</th>
<th>2017-18</th>
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<tbody>
<tr>
<td>80</td>
<td>81</td>
<td>84</td>
<td>83</td>
<td>85</td>
<td>85</td>
<td>86</td>
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</tr>
</thead>
<tbody>
<tr>
<td>55%</td>
<td>67%</td>
<td>54%</td>
<td>93%</td>
<td>98%</td>
<td>100%</td>
<td>100%</td>
<td></td>
</tr>
</tbody>
</table>

1This number represents approved undergraduate programs (both active and suspended programs).
2Percentage is based on the number of active undergraduate programs (does not include suspended programs).

**Indicator 1.2.3: Participation rates in experiential learning with a focus on internships, research, service learning and global learning**

OSU uses a number of means to demonstrate its commitment to deliver content and experiential learning opportunities that enhance rigorous degree programs and provide intellectual, professional and personal development and support to prepare graduates for responsible and productive citizenship in a global society. The data in Table 1.2.3 shows the percentage of graduating seniors who reported having participated in experiential learning activities with a focus on internships, research, service learning and/or global learning as undergraduates. The participation rates have grown from 2013-14 to 2014-15, but there is still room for improvement.
Table 1.2.3: Participation Rates in Experiential Learning

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</thead>
<tbody>
<tr>
<td></td>
<td>70%</td>
<td>69%</td>
<td>66%</td>
<td>68%</td>
<td>69%</td>
<td>75%</td>
</tr>
</tbody>
</table>

OSU’s fulfillment of its commitment to provide students with rich experiential learning opportunities is more fully evidenced by qualitative data from a representative selection of high-impact learning activities. Summaries of such activities are provided in the following section.

**Internships** — Participation of currently enrolled students in off-campus internships within the local community is tracked monthly and reported yearly to key partners. Additionally, many students register for internship credit as part of their academic programs, and the academic units monitor participation rates and outcomes. Participation information on student internships is also gathered in survey form at the end of the year.

**Research** — Student participation in undergraduate research-related events, including university-wide showcases of student work and professional development workshops, is tracked in the Office of Undergraduate Research, Scholarship and the Arts (URSA). This allows OSU to download student demographic data to determine which student demographics are/are not being served most effectively so that the university can be more inclusive moving forward. Data are compiled in reports to enable assessment of changes in student participation/student demographics over time. Additionally, retention data for students participating in OSU’s largest program, URSA Engage, has been tracked to demonstrate its capacity for the promotion of student success and persistence. Participation in the URSA Engage program, in particular, provides a challenging, rigorous cocurricular experience that has been linked to student success and persistence. Additional details about URSA are included in Indicators 1.4.4 and 1.4.5.

**Service Learning** — Participation in service learning and civic engagement offering through the Division of Student Affairs is tracked through the Atrium card-swipe system. All programs offered in the Division of Student Affairs that collect participation data are prompted to select the domain for learning and service to which their program maps. Therefore, the university is able to track the number of programs in the division that are related to service learning and civic engagement. This provides a mechanism to download student demographic data to determine which student demographics are/are not being served and/or participating so that the reach of service learning and civic engagement programming can be broadened as needed. Using participation data, the Center for Civic Engagement determines how student participation rates in cocurricular service learning and civic engagement change over time.

**Global Learning** — The application management system used by the Office of Global Opportunities (OSU GO) provides the ability to track student participation in all global learning affiliated with OSU GO, including study abroad and international internships. This information is compiled in annual enrollment reports indicating student participation by academic college, degree level, world region and program type. Using the data collected, OSU GO determines if student participation in global learning opportunities is increasing. These experiences administered by and tracked in OSU GO provide students with firsthand experience navigating international educational and cultural systems, adding academic and personal rigor to their OSU degree.
Indicator 1.2.4: Satisfaction with value of degree at time of graduation

This indicator assesses undergraduate degree program rigor and effectiveness using measures at the time of graduation. Every year since 2013, OSU’s Office of Institutional Research (IR) has conducted exit surveys of graduating seniors. For undergraduate students graduating from 2013 to 2018, 82 to 84 percent of respondents indicated that they were “satisfied” or “highly satisfied” with the value of their OSU degree, as shown in Table 1.2.4. Although 80 percent is a reasonable benchmark for degree satisfaction, OSU is working to increase satisfaction to greater than 90 percent. To accomplish this objective, SP4.0 Goal 2 focuses on providing a transformative education, integrating research and experiential learning and preparing students for successful careers.

Table 1.2.4: Percent of Graduating Seniors “Satisfied” or “Highly Satisfied” With Value of Degree [Graduating Senior Exit Survey]

<table>
<thead>
<tr>
<th></th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percent of seniors marking “satisfied” or “highly satisfied” with value of degree</td>
<td>82%</td>
<td>82%</td>
<td>82%</td>
<td>84%</td>
<td>83%</td>
<td>83%</td>
</tr>
</tbody>
</table>

Indicator 1.2.5: Percent of graduating seniors reporting immediate plans to work in their field of study or attend graduate school following graduation

In addition to degree value, graduating seniors are asked to report on immediate plans following degree completion. From 2013 to 2017, 38 to 42 percent of students reported they had a job offer in their field or were admitted to graduate school in the fall after graduation (see Table 1.2.5). As an institution, OSU has historically had inconsistent practices and difficulty obtaining comprehensive and reliable information about its graduates once they leave. In response, the Career Development Center (CDC), Institutional Analytics and Reporting (IAR) and Institutional Research (IR) are collaborating with representatives from across the institution to create a consistent process for collecting and reporting graduate placement data. As a result of a task force convened during 2018, there will now be a university-wide shared process for obtaining graduate outcomes data that includes a standard set of questions related to placement, as well as a standardized timeline for survey administration. All data will be gathered and shared with IAR to create a centralized dashboard to report outcomes. Plans for 2019 include progress toward more comprehensive methods to gathering student data.

Table 1.2.5: Percent of Graduating Seniors Reporting Job Offer in Their Field or Admitted to Graduate School in Fall [Graduating Senior Exit Survey]

<table>
<thead>
<tr>
<th></th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percent of seniors reporting job offer in field or admittance to graduate school in fall</td>
<td>40%</td>
<td>40%</td>
<td>38%</td>
<td>42%</td>
<td>38%</td>
<td>—</td>
</tr>
</tbody>
</table>

*This question was changed in format for the 2018 survey and cannot be reported as it was in the past.

Summary of Objective 1.2

Through the cycle of academic program reviews and annual program-level assessments, OSU shows a commitment to maintaining the quality, relevance and rigor of its undergraduate academic programs, from both curricular and pedagogical standpoints. Since 2011, OSU has reached 100 percent compliance
with Undergraduate Academic Program Reviews (UAPR) and 100 percent participation in annual full-cycle assessment of program-level student learning outcomes. It is known that experiential learning activities are associated with student success, and the most recent year of data (2017-18) saw increased participation in experiential learning activities.

Students are generally satisfied with the value of their degrees, though there is room for improvement here. It is also quite possible that if OSU is able to ask about satisfaction once graduates have more time since graduation, there may be a different, and hopefully improved level of satisfaction. Note that while the percentages of students with job offers in their field or plans to attend graduate school seem low, these percentages may not be reflective of the true landscape of post-graduation activities. For example, not all students will find employment directly related to their field of study, yet they are gainfully employed in satisfying positions. Additionally, many students may not have job offers at the time of graduation, but may obtain jobs in the months immediately following graduation. The efforts by the cross-unit task force have resulted in new processes that are expected to help OSU better gather, assess and act upon feedback from students.

Oregon State University strongly fulfills this mission element related to providing rigorous and effective undergraduate degree programs.

Objective 1.3: Provide a supportive and healthy learning environment for student success and leadership development at all levels.

OSU is committed to fostering the personal success of each student and furthering its commitment to serve Oregon, the nation and the world. One important indicator is participation rates in first-year experience courses, connecting with faculty and staff and accessing campus services.

Indicator 1.3.1: Participation rates in first-year experience courses and retention rate of first-year experience course participants compared to non-participants

The Office of Academic Achievement (OAA) serves as the central academic unit for facilitating student learning outside the classroom. Through experiential learning opportunities, first-year programming, academic advising and other services, OAA and its units work to increase and equalize student success, support retention, help students graduate and encourage the holistic development of all students.

The percent retention of first-year experience course participants has trended upward in the past seven years, as demonstrated in Table 1.3.1. Specifically, the number of first-year students participating in a first-year experience course has increased from 537 in 2011-12 to 932 in 2017-18. Additionally, the one-year retention rate of students who participated in first-year experience courses was higher in 2017-18 than for non-participants.

Table 1.3.1: Participation Rates in First-Year Experience Courses and Percent Retention of First-Year Experience Course Participants Versus Those Who Did Not Complete a First-Year Experience Course

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>First-Time, Full-Time Freshmen Cohort</td>
<td>3,480</td>
<td>3,335</td>
<td>3,324</td>
<td>3,553</td>
<td>3,453</td>
<td>3,340</td>
<td>3,523</td>
</tr>
</tbody>
</table>
Number of Students Participating in a First-Year Experience Course | 537 | 468 | 627 | 679 | 741 | 686 | 932
---|---|---|---|---|---|---|---
1-Year Retention Rate of Students Participating in a First-Year Experience Course | 79.3% | 82.5% | 86.6% | 81.3% | 85.0% | 86.3% | 86.1%
---|---|---|---|---|---|---|---
1-Year Retention Rate of Students NOT Participating in a First-Year Experience Course | 81.8% | 83.4% | 83.6% | 84.3% | 84.7% | 82.6% | 84.4%

**Indicator 1.3.2: Percent of degree-seeking undergraduates who identified two or more university representatives who helped them succeed at OSU**

Both Indicators 1.3.2 and 1.3.3 consider the supports students have available to help them thrive and succeed. The Campus Inclusivity Project committee developed a survey, which was launched in winter 2015, to better understand how students define and experience an inclusive campus environment; recognize how such definitions and experiences impact students’ sense of belonging; and to identify individuals who help them succeed.

The Campus Inclusivity Survey is conducted every odd-numbered year, with focus groups conducted during the even-numbered opposite years. The Campus Inclusivity Project is a collaborative effort bringing together undergraduate, international and graduate students, as well as representatives from the Office of Institutional Diversity, academic units, Ecampus, OSU-Cascades, the Graduate School and Student Affairs. For the 2017 survey, a random sample of 4,000 students received an invitation to participate in the survey. The sample included undergraduate and graduate students from Corvallis, Ecampus and OSU-Cascades. Qualitative and quantitative data are analyzed and shared to help OSU better understand the different ways students experience OSU. These data are used to inform the university’s work to enhance student success and create healthy learning environments for all students.

As shown in Table 1.3.2, 86 percent of respondents identified two or more OSU representatives who helped them succeed. In the 2017 survey, the top relationships that students selected as helpful to their academic success included: professors (86.7 percent), advisors (74 percent) and peers (76.3 percent). Additionally, 80.8 percent of student respondents indicated comfort with approaching a faculty member with an academic concern, selecting either “very comfortable” or “comfortable.”

| Table 1.3.2 Percent of Degree-Seeking Undergraduates Who Identified Two or More University Representatives Who Helped Them Succeed at OSU |
|---|---|---|
| Degree-Seeking Undergraduate (Admit Type Freshmen, Transfer, Post-Bacc) Respondents | 2015 | 2017 |
| Degree-Seeking Undergraduates Identifying 2+ OSU Representatives Who Helped Them Succeed¹ | 64% | 86% |

¹Options included: helped you succeed, have not helped you succeed, rather not say, not applicable.
**Indicator 1.3.3: Percent of degree-seeking undergraduates who indicated two or more campus student support resources that were accessible**

The Campus Inclusivity Survey also sought to understand students’ experiences accessing resources available at OSU. The survey found 86 percent of student respondents identified two or more campus support resources that were accessible or very accessible (Table 1.3.3). Students found the following select resources overall to be either “very accessible” or “somewhat accessible:”

- Enrollment Services: 89 percent
- Financial Aid and Scholarships: 69 percent
- Student Health Services: 67 percent
- Academic units: 60 percent
- Office of the Registrar: 60 percent
- Learning Commons: 56 percent
- Counseling and Psychological Services (CAPS): 50 percent
- Graduate Student Success Center: 46 percent

<table>
<thead>
<tr>
<th>Degree-Seeking Undergraduate (Admit Type Freshmen, Transfer, Post-Bacc) Respondents</th>
<th>2015</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>501</td>
<td>364</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Degree-Seeking Undergraduates Listing at Least Two Resources as “Somewhat Accessible” or “Very Accessible”</th>
<th>2015</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>76%</td>
<td>86%</td>
</tr>
</tbody>
</table>

**Indicator 1.3.4: National Survey of Student Engagement (NSSE) Supportive Campus Environment Benchmarks**

The National Survey of Student Engagement (NSSE) is administered at OSU on a three-year cycle. In addition to the analyses provided by NSSE, the Division of Student Affairs produces college-level reports, fills additional data requests for campus partners, and closely examines and disaggregates data that can inform student success efforts. Indicator 1.3.4 describes data that help the institution learn more about how OSU helps students academically, socially and with nonacademic responsibilities. In addition to the important areas in the NSSE that are called out in this indicator, the NSSE measures student involvement in high-impact practices such as study abroad programs, experiences with peers, and experiences with faculty outside the classroom.

As shown in Table 1.3.4, there were no substantive changes (on the scale of moving up or down one unit on the corresponding Likert scale) in the ratings in the listed categories for freshmen and seniors between 2013 and 2016. While OSU is performing well on several of these ratings, there is still some room for improvement, especially in the area of helping students cope with nonacademic responsibilities.
Table 1.3.4: National Survey of Student Engagement (NSSE) Supportive Campus Environment Benchmarks

<table>
<thead>
<tr>
<th></th>
<th>2013</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Freshmen: Quality of Academic Advising¹</td>
<td>5.27</td>
<td>5.44</td>
</tr>
<tr>
<td>Freshmen: Providing You Support to Succeed Academically²</td>
<td>3.17</td>
<td>3.06</td>
</tr>
<tr>
<td>Freshmen: Helping You Cope with Nonacademic Responsibilities²</td>
<td>2.36</td>
<td>2.28</td>
</tr>
<tr>
<td>Freshmen: Providing Support to Help You Thrive Socially²</td>
<td>3.00</td>
<td>2.90</td>
</tr>
<tr>
<td>Seniors: Quality of Academic Advising¹</td>
<td>5.28</td>
<td>5.27</td>
</tr>
<tr>
<td>Seniors: Providing You Support to Succeed Academically²</td>
<td>2.92</td>
<td>2.93</td>
</tr>
<tr>
<td>Seniors: Helping You Cope with Nonacademic Responsibilities²</td>
<td>1.99</td>
<td>2.01</td>
</tr>
<tr>
<td>Seniors: Providing Support to Help You Thrive Socially²</td>
<td>2.74</td>
<td>2.79</td>
</tr>
</tbody>
</table>

¹7-point scale from poor (1) to excellent (7).
²4-point scale from very little (1) to very much (4).

Summary of Objective 1.3
In the most recent cohorts of first-time full-time freshmen, there is some positive separation in first-year retention rates between students who participated in a first-year experience course versus those who did not. OSU will continue to study these numbers to assess the value of these courses. The university is encouraged to see large increases in percentages — 12 and 10 percentage points — of respondents to the Campus Inclusivity Surveys who indicated two or more contacts with OSU representatives who helped them to succeed, and that at least two resources were somewhat or very accessible to them. This supports the understanding that having a sense of belonging or connection to OSU is associated with student success.

Oregon State University fulfills this mission element related to providing a supportive and healthy learning environment for student success at all levels.

Objective 1.4: Use faculty research and scholarship to enrich the undergraduate curriculum.

The joint pursuit of research preeminence and transformative education underpins OSU’s mission and vision. Students innovate alongside faculty to pursue discoveries and solve complex problems locally and globally. For example, starting in 2000, OSU funded the Undergraduate Research, Innovation, Scholarship and Creativity (URISC) program, which was designed to create opportunities for undergraduate students to pursue scholarly and creative activities with OSU’s diverse, world-class faculty. The URISC program provides students with resources that better enable them to work with artists, engineers, scientists, public policy specialists, humanists and health experts. From 2000 to 2017, 1,393 applications were received for review, and a total of 476 applications were funded at a range of $500 to $4,000. Undergraduate research improves education and experience, reduces the achievement gap between historically underrepresented students and the broader student population and advances the university’s research mission.

The following five indicators in Objective 1.4 demonstrate other examples of OSU’s ongoing commitment to enriching student learning experiences through faculty research and innovative curricula.
Indicator 1.4.1: Number of faculty-led study abroad programs

Faculty-led study abroad programs account for approximately half of all student participation in education abroad, with 292 OSU students participating in the 2017-18 academic year. Ranging in length from one week to a full academic quarter, these programs combine faculty research and scholarship with a pedagogically and culturally immersive experience for students. Rooted largely in the global experience of OSU faculty, these study abroad programs are designed, led and instructed by OSU faculty and offer students the opportunity to enrich their studies by participating in and witnessing the global impact of OSU.

Annual increases in student enrollments from 2011 to 2017 reflect the ongoing work of the Office of Global Opportunities (OSU GO) to administer and actively promote these programs to students of all academic disciplines and reflect faculty investment in transformative student experiences (See Table 1.4.1). Additionally, the typically short duration of faculty-led study abroad programs, combined with the opportunity to travel and study directly alongside faculty and students, supports the university’s mission and appeals to students for whom longer, more independent study abroad experiences may be challenging due to time constraints or a lack of previous travel experience.

Table 1.4.1: Number of Faculty-Led Study Abroad Programs

<table>
<thead>
<tr>
<th>Year</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Study abroad programs</td>
<td>9</td>
<td>8</td>
<td>15</td>
<td>13</td>
<td>18</td>
<td>22</td>
<td>26</td>
</tr>
</tbody>
</table>

Faculty-led study abroad programs offer a wide range of academic and international experiences for students, as demonstrated through a small sample of previously offered programs, including the following:

- **L’Environnement French Style**: Introduced students to international aspects of Environmental Sciences in the French city of Poitiers, surveying the layers of human modification of the natural environment from a Roman aqueduct to contemporary wind and nuclear energy sources.

- **SWASTI and CPHHS**: Based in India, these programs combined student research in local communities in Bangalore, India, with course content in the social and individual determinants of health from local and global perspectives.

- **Farm, Fork and Glass: Agriculture and Innovation in England**: gave students a firsthand look at dairy, crop, fermentation and other agricultural commodity producers in and around Nottingham, England, focusing on agricultural practices from historical times to new and emerging technologies.

Indicator 1.4.2: Examples of innovative curricula that incorporate faculty research and scholarship

- OSU has a number of examples of innovative curricula that incorporate faculty research and scholarship. In 2017, OSU was recognized with a **WICHE Cooperative for Educational Technologies (WCET) Outstanding Work (WOW) award**, a 2017 Online Learning Consortium (OLC) Effective Practice Award and an Eduventures Innovation award for its groundbreaking, first-of-its kind **3D Virtual Microscope** and online introductory biology course series. Developed in partnership with OSU Ecampus and faculty in the departments of Integrative Biology and Botany and Plant Pathology, the 3D Virtual Microscope puts the functions of a microscope in the hands of distance education students so they can complete the full biology series online. This online simulation provides much-
needed student interaction with lab equipment for students in Ecampus courses. The collaboration involved more than 30 OSU faculty, department heads, OSU Ecampus multimedia developers, instructional designers and other staff.

• **Undergraduate Experiential Learning (EL)** in the College of Business aims to purposefully engage all students in experiential learning and focused reflection in order to increase knowledge, develop skills and expand students’ capacity to be work-ready and contribute to their communities. The college operationalizes EL broadly, including participating in major events or conferences, case/pitch competitions, applied projects, field trips, international experiences, workshops, internships and research. Initiatives are underway to achieve the college’s goal of 100 percent student participation in at least one EL activity each year.

• The *Austin Family Business Program* excels as a pacesetting family business resource as well as offering a family business option that is part of the business administration major in the College of Business. OSU students majoring in fields outside business can now earn a minor in family business. The business option or minor can be a career advantage as it prepares graduates for working in family companies or building a career in the financial services where family businesses will be clients.

• At OSU-Cascades, Associate Professor Chris Hagen, graduate student Sean Brown and colleagues in the Energy Systems Lab have developed a hybrid drone that can be deployed for lengthy search-and-rescue missions, forest and farm crop monitoring, and landscape mapping. Their work includes dynamometer engine testing, engine development, unmanned aircraft systems development and hybrid powertrain development.

• OSU-Cascades Assistant Professor of Biology Matt Orr and Associate Professor of Natural Resources Ron Reuter have collaborated to develop a two-week summer field course that applies *ecological methods to ecological restoration*. The course camps at its study sites and teaches students ways that science can address environmental challenges. In the past two years, students have *built and monitored beaver dam analogs*, electrofished for steelhead, analyzed soils for their suitability for restoration plantings and studied factors that affect aspen and ponderosa forest restoration.

• OSU-Cascades Associate Professor Shannon Lipscomb conducts research on *resilience in children, families and communities*. In 2018, Lipscomb developed and taught an upper-division special topics in human development and family sciences course on resilience. She incorporated two research projects into the course and structured it as a hybrid course so that students would complete online modules for a federal research project to increase knowledge and application of trauma-responsive, resilience-promoting practices for engaging with children and families.

• The *School of Psychological Science* provides valuable opportunities for undergraduate students to gain research experience in psychological science. With faculty mentorship, many students have the opportunity to be published or attend a national conference. Research ranges from cognition to nonverbal behavior, stress and coping, mood and cognition and social cognition.

• The *Tourism, Recreation and Adventure Leadership (TRAL)* degree in the College of Forestry prepares undergraduates for careers in the tourism and outdoor recreation industries, which continue to grow in Oregon and throughout the nation. TRAL graduates are prepared to be leaders, educators and entrepreneurs in the world’s most important natural spaces and create new businesses based on the idea of sharing the outdoors with others.
Indicator 1.4.3: Examples of faculty research that engages undergraduate students

As a research-intensive university, faculty research engages undergraduate students. The following section presents examples:

- The College of Engineering has invested in undergraduate research and mentoring and currently supports three Research Experience for Undergraduates (REU) sites: one in robotics, one on clean water and one in collaboration with the College of Science around mathematical thinking. These programs help bring talented students from across the nation interested in exploring a potential career in research and serve as an extension of faculty-led undergraduate research. This year, private donations have made it possible to bring four international students to participate in these summer research programs.

- At OSU-Cascades, Associate Professor Christine Pollard consistently engages undergraduate kinesiology students in the Functional Orthopedic Research Center of Excellence (FORCE) Laboratory, a human movement biomechanics laboratory that is part of the kinesiology program. In the past two years, two students presented their research as a podium presentation at a regional biomechanics conference, and three students presented their research as a poster presentation at a regional sports medicine conference. Two students received Layman Funds to conduct their research projects in the FORCE Lab. Additionally, one student was named an author on a research publication due to his substantial contribution to the project.

- Two Human Development and Family Sciences faculty (HDFS), Associate Professor Shannon Lipscomb and Assistant Professor Brianne Kothari, along with Computer Science Instructor Yong Bakos, have collaborated to create the Software Systems 4 Social Innovation Lab, which engages undergraduate students in interdisciplinary projects that involve faculty research and outreach.

- The College of Forestry launched the Institute for Working Forest Landscapes (IWFL) to focus research programs on innovative approaches for managing landscapes that will enhance people’s lives and improve the health of lands, businesses and vital ecosystems. The IWFL develops adaptive forest management techniques that integrate social, ecological and economic objectives at the landscape level. It will continue to operate under the auspices of the Forest Research Laboratory to more clearly focus the work of college faculty and students to meet the needs of Oregon.

Indicator 1.4.4: Participation in undergraduate research

OSU has invested considerably in structural and organizational support for undergraduate research. The Office of Undergraduate Research, Scholarship and the Arts (URSA) oversees the largest campuswide program for undergraduate research and creative work, the URSA Engage Program. Designed to establish mentoring relationships between faculty and undergraduates early in their academic programs, the program provides first- and second-year students, as well as transfer students in their first year, opportunities to pursue research or a creative activity under the guidance of an OSU faculty mentor. The program is available to undergraduates and mentors at all OSU campuses and across all academic disciplines, including online learners pursuing degrees through Ecampus. In 2018, an Ecampus student received the Library Undergraduate Research Award (LURA) for the first time.

One of the university’s goals has been to increase participation in the URSA Engage Program. OSU has closely tracked participation since 2014 and has seen the number of students receiving URSA Engage awards increase considerably from 29 during the 2015-16 academic year to a high of 116 during the 2017-18 academic year (see Figure 1.4.4A). The program also aims to increase participation of students from historically underrepresented groups, transfer students and first-generation college students. In 2017-18,
OSU saw the highest number of participants in each of these three groups.

Figure 1.4.4A: Participant Counts for URSA Engage

<table>
<thead>
<tr>
<th>Academic Year (Summer to Spring Term)</th>
<th>Underrepresented students</th>
<th>Transfer students</th>
<th>First-generation students</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014-15</td>
<td>20</td>
<td>10</td>
<td>10</td>
<td>40</td>
</tr>
<tr>
<td>2015-16</td>
<td>20</td>
<td>10</td>
<td>10</td>
<td>40</td>
</tr>
<tr>
<td>2016-17</td>
<td>20</td>
<td>10</td>
<td>10</td>
<td>40</td>
</tr>
<tr>
<td>2017-18</td>
<td>140</td>
<td>120</td>
<td>100</td>
<td>360</td>
</tr>
</tbody>
</table>

Students participating in the URSA Engage Program have maintained an average first-year retention rate of 97 percent over the past three years, with increases since 2014 (see Figure 1.4.4B). These impressive retention data from participation in this program have allowed the university to gain support from the colleges that matched funding for student awards in 2016-17, contributing to a 190 percent increase in the number of student awards distributed during the 2017-18 academic year.
In addition to these student data, faculty participants are surveyed to better understand the impact of the program on mentors. Among survey respondents, 89 percent of faculty participants indicated they probably or definitely would continue their partnership with their URSA Engage students after the program ended.

Regularly evaluating the URSA Engage Program also allows OSU to conduct formative assessment and make program improvements. Findings from the faculty survey have also promoted program improvements. For example, 61 percent of surveyed faculty indicated that URSA Engage students would benefit from a required professional development workshop hosted by URSA. As a result, starting in 2018, URSA Engage students will attend Getting the Most from Undergraduate Research, a workshop designed to help them learn skills such as how to articulate their research experiences on their résumés/CVs, begin developing a research identity and apply for prestigious scholarships.

Tracking retention rates of participants, as well as tracking participation rates of students from across demographics (i.e., students from historically underrepresented groups, transfer students and first-generation college students) has illustrated the impact of the URSA Engage Program and allowed OSU to demonstrate another way of accomplishing the core theme objective of using faculty research and scholarship to enrich the undergraduate curriculum. The retention data in particular speaks to the value of using faculty research and scholarship to enrich the undergraduate curriculum. The URSA Engage Program can be seen as one example of a high-impact undergraduate research program at OSU; there are at least 20 other undergraduate research programs across campus coordinated by different colleges and academic units.

Results of the assessment are made widely available across campus. They are reported to OSU college deans/associate deans and members of the URSA Task Force. Reports and relevant data are included in emails to stakeholders who have participated or who are interested in participating as mentors in the URSA Engage Program each year. Numbers are also reported in annual reports created within the Office of Undergraduate Education.
Indicator 1.4.5: Examples of support for undergraduate student research

OSU has pursued grants and initiatives that support undergraduate student research. The following are several examples:

• **Summer Undergraduate Research Experience in Science (SURE Science)** in the College of Science awarded $209,000 to 38 undergraduates in the summer of 2018 to conduct research in OSU’s three signature areas of distinction. This is a substantial increase from previous years, thanks to a generous contribution to the 2018 SURE Science program, which is supported by science alumni and friends.

• All **College of Engineering** undergraduate degree programs require a capstone research project or thesis that culminates in an annual Undergraduate Engineering Expo. Previous research project include the use of nanotechnology to treat storm water and development of a biogas cooktop for home use.

• Funded by the National Science Foundation, **Research Experiences for Undergraduates (REU): From Estuaries to the Deep Sea** offers students the opportunity to work on individual research projects and participate in group field trips, seminars and science colloquia over an intense 10-week period in the summer. The paid research internships provide funding for 20 to 24 students each summer. Students are located at the Hatfield Marine Science Center (HMSC) in Newport and at the College of Earth, Ocean, and Atmospheric Sciences (CEOAS) in Corvallis. Each student is associated with a specific research project, working closely with the faculty and other researchers. 2018-19 marks the 14th year of the program, drawing undergraduates from OSU and across the nation to conduct leading-edge marine science research. Nearly half of the students in the 2018 REU summer program will have presented their summer research at scientific meetings, including the 2018 American Geophysical Union (AGU) fall meeting and the 2019 Association for the Sciences of Limnology and Oceanography (ASLO) meeting.

• The **NSF-funded OSU STEM Leaders program** develops early, cohort-based STEM integration and an expanded, enduring culture of undergraduate research at OSU with particular emphasis on facilitating early access to research under peer and faculty mentorship. There have been four cohorts of students, with cohort sizes ranging from 40 to 62. The first cohort began in the 2014-15 academic year. First-year completion rate has been over 90 percent for each of the first four cohorts of the program. Many students in the program are considered at risk of dropping out, making the numbers even more significant. Conversations are underway for identifying resources to sustain and expand the STEM Leaders program after the grant runs out.

• At **OSU-Cascades**, the Layman Foundation began a $100,000 gift in the fall of 2017 to support experiential learning opportunities for undergraduate students in Bend. Grants of $2,500 are awarded to about 20 students per year to work with faculty mentors on research projects across campus. Research ranges from the study of emergent cultural theories such as metamodernism to the study of stickleback fish populations as an indicator for local watershed health. Undergraduate research is a high-impact practice that improves retention through experiential learning outcomes.

• Students from OSU, Oregon Health & Science University and Portland State University in the pharmacy, medicine, dentistry, nursing and public health programs partnered to develop the **Bridges Collaborative Care Clinic**. Opened in October 2017, this interprofessional, student-run free clinic assists vulnerable populations by providing low-barrier, participant-centered care and services in the Portland metro area. Both undergraduate and graduate students participate.
Summary of Objective 1.4
OSU faculty are extremely dedicated to the research mission of the university, and many of them engage undergraduate students in their ongoing research efforts by providing research opportunities to students or by bringing their research into their classrooms. A consistent draw for students is the strength and breadth of the university's research enterprise; many students are eager to learn firsthand about knowledge discovery and development, and they see these experiences as very important to their undergraduate academic careers.

Oregon State University strongly fulfills this mission element related to using faculty research and scholarship to enrich the undergraduate curriculum.

CORE THEME 1: IMPROVEMENTS

Measuring Student Learning Outcomes
The Office of Academic Programs and Assessment (APA) supports OSU faculty in developing new courses and programs, course and program revision and measuring learning outcomes. Curriculum coordinators help to shepherd program proposals through the robust Faculty Senate processes that ensure quality academic programming across the university, and they work with faculty and staff on the annual completing of learning outcome assessments.

Quality academic programs lie at the heart of providing a transformation education experience for all learners. OSU ensures quality through a vigorous review process for new academic programs and regular 10-year external reviews for existing programs. The external reviews are informed in part by the annual program assessments required of all academic programs.

1. Course-level student learning outcomes
   All syllabi are required to have course-level student learning outcomes. This means that any new course or any course that enters the Curriculum Proposal System (CPS) for a change must have learning outcomes. The university requires that student learning outcomes be written using Bloom’s taxonomy, using active verbs so that the outcomes can be used to assess students’ factual knowledge, conceptual knowledge, procedural knowledge and meta-cognitive knowledge.

2. Program-level student learning outcomes
   It is sometimes the case that one or more course-level student learning outcome(s) from a capstone or other course or courses within a program are used to assess program-level student learning outcomes. For example, this occurs in the Graphic Design program in the College of Liberal Arts and the Design and Innovation Management program in the College of Business.

3. Baccalaureate Core category learning outcomes
   Each course in the Baccalaureate Core falls into one or more categories. Each Bacc Core category is reviewed by the Faculty Senate Baccalaureate Core Committee on a seven-year cycle. These reviews involve an evaluation of all courses in the category, including a narrative description by the faculty of how specifically the category learning outcomes are assessed (e.g., exams, an essay assignment, etc.), along with an appraisal of what percentage of students taking the course have meet each student learning outcome.

The Student Affairs Assessment (SAA) office is responsible for the leadership and coordination of assessment efforts within the Division of Student Affairs. SAA facilitates a reporting process that prompt each department in the Division of Student Affairs to articulate how it participates in the assessment
cycle. In addition to facilitating the reporting process, SAA provides support for units that need thought partners or guidance when planning their assessments. Two examples of how departments in the Division of Student Affairs are using learning outcomes assessment to guide program improvements are shared below:

- **Student Conduct and Community Standards (SCCS)** designed, implemented and analyzed a learning assessment technique that identified what learning occurred during an administrative conference, as well as an academic integrity process to determine how that learning contributes to student success. Learning artifacts gathered at the conclusion of the administrative conference and the academic integrity process established that students are learning skills associated with the personal and leadership development student affairs domain of learning and service. While SCCS assessment data clearly identified that learning is occurring during the administrative conference and academic integrity process, this same data identified educational sanctions as a second opportunity in which SCCS can further enhance learning.

- **The Women’s Center** conducted a survey and focus groups to learn more about its impacts and to identify where it can improve learning opportunities and service to students. In an effort to close the loop, the center created and shared an infographic to thank students for their feedback, provide an overview of what was learned and highlight areas for improvement.

**Innovative Learning Spaces**

Much of the effectiveness of an institution’s overall learning environment is dependent on space utilization. In recent years, OSU has implemented new structures and modified current ones to achieve optimal results in student learning, as demonstrated in the examples below:

**Learning Innovation Center:** Opened in fall 2015, OSU’s Learning Innovation Center (LInC) is a four-story building designed to meet the increasing classroom and support needs resulting from enrollment growth on the Corvallis campus. LInC offers 15 general purpose and four Honors College classrooms seating a total of 2,200 students. The wide variety of learning space designs, from scale-up to horseshoe to learning-in-the-round, delivers options to faculty of all disciplines to implement new pedagogies. Particularly distinctive are the three learning-in-the-round rooms seating 600, 300 and 180 students, respectively. The learning-in-the-round design has a transformative effect on teaching and learning because it radically increases the proximity of students to the instructor, facilitates the instructor’s mobility throughout the room, and physically orients students in such a way that they can participate and absorb information more easily. In addition, the fourth floor houses the Honors College and the Integrated Learning Resource Center, which includes Academic Technology, the Center for Teaching and Learning and other teaching and learning support units for students and faculty. Other universities continue to request tours of LInC, and several are now building learning-in-the-round rooms based on the design established in LInC.

**Undergraduate Research and Writing Studio:** Since the opening of the Valley Library in 1999, OSU Libraries and Press (OSULP) has sought to provide flexible and collaborative learning spaces by repeatedly rethinking the use of its own public space. For several years in a row, students voted the Valley Library as the best place to study on the OSU campus. In fall 2018, OSULP partnered with the OSU Writing Center to launch the Undergraduate Research and Writing Studio on the main floor of the Valley Library. The studio emphasizes peer-to-peer instruction, although students can also request help from Writing Center faculty and OSULP librarians. Library faculty approached planning for the new space by visiting similar spaces at peer institutions and by committing to a service-design approach that engaged all stakeholders.
The 2017-18 annual report of the Writing Center suggests that co-locating the Writing Studio in the Valley Library is increasing student access to critical academic support services, especially for vulnerable student populations. Usage of the studio by historically underrepresented students, transfer students and first-generation students increased by 70, 53 and 22 percent, respectively, over the 2016-17 academic year.

**Using Technologies to Enhance Student Learning**

**Adaptive and Personalized Learning Initiative:** Through membership in the Association of Public and Land Grant Universities (APLU) Personalized Learning Consortium, OSU developed the Adaptive and Personalized Learning Initiative, which provides resources supporting faculty to implement adaptive courseware in foundational general education courses to improve undergraduate student learning and success. A collaborative effort involving administrative and academic units across the university, the project aligns with the institutional goal of raising retention and graduation rates by focusing on innovative blended learning pedagogies to increase student engagement and achievement of foundational learning outcomes. Mastery of foundational skills and content learning experiences aids progress toward the level of academic excellence needed to be competitive in the global economy.

Collected data that identified high-enrollment, high-fail-rate foundational courses led to 18 courses being selected for redesign involving the implementation of adaptive courseware. Additionally, because these courses are in or lead into the Baccalaureate Core, the university is working with faculty to assess the Bacc Core learning outcomes for each of the courses and meeting with the redesign team to support development of a mechanism to assess student mastery of Bacc Core learning outcomes based on student work from courses before and after redesign. In collaboration with Academic Technology, tools will be developed to facilitate and record the learning outcomes assessment for each course moving forward.

Based on learning science, adaptive courseware partitions content into modules optimized for learning and retention. Required assessments at the end of each module test the student’s understanding and retention of the content. The activities provide immediate feedback and personalized repetition until mastery of the material triggers progression to the next module. Through surveys and focus groups, students have communicated a greater sense of confidence and belonging in the redesigned courses, with 69 to 84 percent reporting satisfaction with the learning effectiveness of adaptive courseware and 65 to 89 percent recommending using adaptive courseware in other courses. In light of these results, OSU administrators and faculty have presented on developing best practices for the implementation and scaling of adaptive courseware at other Oregon universities as well as at national conferences. The Adaptive and Personalized Learning Initiative has increased OSU’s visibility as a leader in digital learning.

**Institutional Analytics and Reporting:** Institutional Analytics and Reporting (IAR) is the central university organization responsible for creating reports, resources and tools to provide access to actionable and accurate information that enables effective decision-making, allocation of resources and assessment of programs and initiatives. Formed in fall 2017, IAR leads the OSU community to organize, strengthen and advance institutional reporting, analytics and data literacy across the university. By continually supporting the institutional units and programs that support students, IAR contributes to improving the transformative educational experience for all learners. Some of the specific ways IAR accomplishes this include:

- Providing operational reporting to academic units in support of student experience, retention and graduation outcomes.
- Directly supporting the work of the Undergraduate Student Success Initiative (USSI) through the creation of new dashboards and workbenches that align with key metrics of success.
• Participating on the USSI committee to provide data analysis and training that help shape the future of student success efforts.

• Responding to requests for changes and new reports needed by campus, colleges, advisors and business centers to meet the evolving business needs.

• Partnering with units to develop the types of reports, tools and trainings needed to move efforts forward in support of their initiatives.

• Preparing annual graduation and other student surveys.

**Leepfrog Technologies:** OSU contracted with Leepfrog Technologies to deliver a new suite of web-and-mobile-friendly tools for services that are critical to students, staff and faculty. The first tool that OSU implemented is a new Academic Catalog that includes direct links to each academic program website. The second tool displays the entire schedule of courses in a term with improved search functionality, enabling students to quickly locate low- and no-cost textbooks in addition to sorting courses by campus, modality and Baccalaureate Core. Phase two of the schedule of classes will allow for interactivity between a student’s account and schedule to ensure degree requirements are being met. OSU is currently implementing the third tool, a curriculum proposal system that allows faculty to submit courses and programs via a streamlined process that communicates directly with the new catalog. Finally, the fourth tool is a class scheduling tool for all departments on campus to manage their schedules both in the current term and far into the future.

The focus of integrating these tools is to improve student success by enabling students to smoothly navigate the course catalog and schedule for the purpose of identifying courses needed to complete their degree. The total experience will be realized when the class scheduling tool is fully operational, as faculty and academic units will have the ability to create a four-year program plan, and students’ degree maps can be automatically produced as a result of the departmental planning. Additionally, providing the information to students and making it reportable allows OSU to enhance the student experience by guiding them to make more informed decisions.

**Advancing Student Gains in the Academic Curriculum**

**Ecampus:** Ecampus has partnered with academic units to develop a significant portfolio of top-ranked degrees for a global online audience that directly relate to the university’s three signature areas of distinction. Furthermore, a growing number of recently developed online degrees in business and STEM fields are meeting industry and learner demand. Since its launch in summer 2012, enrollment in OSU’s Computer Science post-baccalaureate degree has ballooned from 101 students in its first term to more than 1,500 in fall 2018, making it the university’s most highly enrolled online program. With students able to earn a degree in as little as one year, the program has produced nearly 1,300 graduates to date, and interviews conducted with students approaching graduation reveal that in-demand computer science jobs present graduates with favorable employment opportunities.

**Teach the Teacher:** In 2013, library faculty partnered with colleagues in the School of Writing, Literature and Film to develop and launch a Teach the Teacher model. This model had library faculty serve as guest lecturers in all Writing 121 (WR 121) classes, the only course required of all students. Two senior library faculty members used various methods to rethink the libraries’ approach to interacting with the WR 121 instructors and to revise the curriculum. Methods included analysis of in-class assignments, graded research papers, student research practice and the use of surveys, interviews, pre- and post-class assessments. The result of their work led to embedding research instruction throughout the WR 121 curriculum, scaffolding the sequence of writing assignments and encouraging curiosity during the entire
research process. Assessments of students enrolled in WR 121 have indicated that students’ confidence in identifying library resources increases by the end of the course.

**Fostering a Culture of Care and Support for Students**

**CAPS:** The increasing prevalence and severity of college student mental health issues, and their subsequent impact on student academic success, has become a growing national concern in higher education and one that Oregon State University is taking seriously. OSU’s Counseling and Psychological Services (CAPS) is the primary mental health provider on the Corvallis campus, with a multidisciplinary staff consisting of 20 therapists, two health promotion professionals and 10 advanced graduate trainees. CAPS offers support in a variety of ways to meet the needs of all students, providing a broad range of services tailored to a student’s concerns, preferences and level of motivation. These include brief individual therapy, couples counseling, psychoeducational resources, more than 30 different therapy groups offered per term and a single session clinic for students who are seeking a one-time consultation. OSU’s students’ use of mental health services has dramatically increased during recent years. The number of students seeking care at CAPS has risen by 58 percent in the past five years, with CAPS treating 3,002 students and providing 15,026 clinical contacts during the 2017-18 academic year.

Beyond providing traditional mental health clinical services, CAPS develops programming designed to improve the overall mental health of the campus community. This programming is intended to build a culture of care in which all OSU community members see it as their responsibility to support students’ emotional well-being. As an example, during the 2017-18 academic year, CAPS’ suicide prevention program educated 1,813 OSU community members on how to recognize and appropriately respond to the warning signs of suicide. CAPS is exploring models to train all faculty, staff and students in how to have more effective conversations with those who are struggling with mental health issues.

**#DamWorthIt:** The #DamWorthIt campaign is a student-led initiative launched in 2018 to bring awareness to the prevalence of mental health issues and remove the stigma attached to discussing such issues openly. These efforts have been accomplished largely through social media and designating public spaces for discussion. Borne from the tragedy surrounding the suicides of two student-athletes, the #DamWorthIt leaders are student-athletes who believe the high profile and visibility of their athletic obligations could be used to advance open dialogue. Because of the public nature of the campaign, thousands of contacts have been reached, including other students on campus, faculty, the general public, OSU sports fans and student-athletes at other institutions. The campaign is an ongoing effort, and the student-athletes involved have been asked to present and discuss their initiative all over the country. They recently won a grant from the Pac-12 to launch the campaign at other institutions in the conference and were featured in an article in *Sports Illustrated*.

Documented materials include personal accounts and film projects that illustrate how students have managed their own personal journeys with mental health issues. This has prompted other student-athletes to share similar struggles in small groups or publicly. By recruiting more participants and supporters, the campaign seeks to bring mental health speakers, workshops, education and other resources to all Oregon campuses.

**Student Care Office:** The Student Care Office helps students navigate challenging life circumstances and hurdles by equipping them with tools, resources and other options to alleviate these stressors, persist through them and complete their degrees. Student care has historically been rooted in the Office of Student Life, but has recently undergone a transition to a case management framework, which follows best practices in the new field of higher education non-clinical case management toward a multi-faceted, high touch-point approach.
Fostering Student Success

University Innovation Alliance: Oregon State University is a founding member of the University Innovation Alliance (UIA), a consortium of 11 large public research universities dedicated to improving educational outcomes and degree completion for all students regardless of socioeconomic background. Participation in the UIA strengthens OSU’s reputation as a university focused on student success and facilitates engagement with numerous external partners, including a network of peer institutions across the U.S. as well as major philanthropic organizations, such as the Bill & Melinda Gates Foundation, Strada Education Network and Great Lakes Education Philanthropy. Through close partnerships with other universities in the UIA, OSU identifies innovative practices to help more students graduate; adapts those practices to serve a broader range of students; gains valuable insights about what has worked, what has not and why; shares these insights with the higher education community and applies them to work more efficiently on student success projects in support of providing a transformative educational experience for all learners.

OSU contributes to rigorous evaluation with each UIA project to understand the impact of the specific project interventions on campus student success outcomes. OSU’s Monitoring Advising Analytics to Promote Success (MAAPS) advising program is one of 11 UIA sites for the MAAPS research study funded by a $8.9 million First in the World grant from the U.S. Department of Education. The MAAPS study incorporates advising and student records data from over 10,000 first-generation and low-income college students to characterize the effect of proactive, intensive academic advising interventions on retention and progression. Another example is the Beaver Completion Grants program, which provides micro-grants to students with financial need who are approaching graduation but are unable to continue due to unpaid account balances. The program is part of a larger UIA partnership to assess which awarding strategies have the greatest impact on student persistence to inform similar micro-grant efforts at universities across the country.

CORE THEME 1: CHALLENGES

• OSU has reported on some promising programs and services for increasing the first-year retention rate, increasing the six-year graduation rate and for closing the gaps in these metrics for students from underrepresented groups and Pell-eligible students. Nevertheless, OSU has not reached its aspirational goals of a 90 percent first-year retention rate and the elimination of gaps for different groups. The university must continue to improve access and affordability to its programs and services that impact student success. For example, having shown a 97 percent first-year retention rate among students participating in the URSA Engage program, additional funding and faculty resources must be found to support expansion of this program.

• OSU will see a larger proportion of undergraduate students entering the university from community colleges over the next decade, and OSU must increase its support and programming for transfer-admit students.

• OSU has achieved 100 percent compliance with academic programs submitting annual assessments of program-level student learning outcomes, and the university must emphasize using those assessments for continual program improvement.

• Technology is shaping classroom and out-of-classroom instruction and the student experience. OSU must continue to stay at the forefront of technological innovations that support student success.
OSU SPOTLIGHT: UNDERGRADUATE STUDENT SUCCESS INITIATIVE

Since 2015, the Undergraduate Student Success Initiative (USSI) has undertaken major efforts to advance OSU’s undergraduate student success goals, including launching a fundraising initiative in partnership with the OSU Foundation to raise $150 million to support and bolster student success. To date, more than $100 million has been raised. Central to these efforts is a comprehensive, university-wide plan developed and overseen by the USSI Steering Committee as a result of having completed its first phase of work, which entailed researching and benchmarking effective student success measures, collecting an inventory of existing university efforts to foster student success, determining campus needs that will enable and advance student success, and understanding the technical and structural requirements needed to create a sustainable infrastructure (i.e., metrics, analytics and support tools). The plan includes five interconnected areas of institutional focus, which have been prioritized based on the input and expertise of more than 300 faculty, staff, students, institutional leaders and associated stakeholders:

1. **Transition Experiences**: Support the student transition into OSU, whether from high school, community college or as an older adult; build a culture that fosters relationships between students and faculty, with an emphasis on mentoring.

2. **Financial Aid and Scholarships**: Efficiently distribute financial aid and scholarships to those whose success will most likely be attained through such support. To a first approximation, this means providing financial aid to those most in need.

3. **Faculty-Student Engagement**: Significantly expand faculty-student connections outside of class to address student needs and establish an appropriate disciplinary framework, with particular focus on students’ first two years at OSU.

4. **Curricular Excellence**: Improve and streamline curriculum, curricular innovation and instructional excellence.

5. **Experiential Learning**: Expand access to experiential learning opportunities for students.
The USSI is advancing these in a sequenced fashion, with a focus during the 2018-19 academic year on improving transition experiences. As a result of this focus, a Faculty-Student Mentor Program for students new to OSU and from vulnerable populations has been piloted and assessed; 130 faculty members have volunteered to serve as mentors, and approximately 300 students have enrolled as mentees. Furthermore, as of December 2018, the following issues are being examined and targeted for improvement within the area of focus:

- **Transfer Credit Articulation**: The USSI is moving toward implementation of Brainware, an optical character recognition (OCR) software package, to automate the articulation of transfer credits into OSU. A pilot program shows reduction of articulation from weeks to days.

- **Early Alert Systems — Early Intervention**: The USSI is examining early alert and early intervention in approximately one dozen large-enrollment freshman classes that are strongly correlated with student success.

- **Pre-Admission Advising and Pre-Arrival Communication**: Improve advising and communication with students prior to arrival at OSU.

- **First-Year Curriculum**: The USSI will be evaluating the merits of a college-centered required first-year curriculum, designed to assist students in transition.

- **Scholarship/Financial Aid**: The USSI is studying how best to allocate scholarship and aid funds as a strategy to improve student transition.
OSU SPOTLIGHT:
INTO OREGON STATE UNIVERSITY

Launched in 2008 in response to the internationalization goals detailed in Strategic Plan I, INTO Oregon State University (INTO OSU) is a joint venture between OSU and INTO University Partnerships, a sector-leading UK-based company that specializes in global market intelligence, best-practice international student success and support strategies, the marketing and recruitment of universities’ international offerings, as well as onboarding new students through Academic English and undergraduate and graduate pathway programs. The mission of INTO OSU is to increase the number of international students at OSU; promote the global dimension of the university’s mission; aid OSU’s progress toward becoming a more inclusive and vibrant international university environment; and empower all OSU international students to succeed in and contribute to a global community, beginning with their collegiate studies. Associated programs help develop important skills for international students to become oriented to the academic culture of U.S. higher education, specifically that of OSU. Furthermore, by growing the international community on the Corvallis campus and providing opportunities for domestic U.S. students to integrate and work with students from all over the world, INTO OSU helps enrich the domestic U.S. student educational experience through exposure to diverse global perspectives and experiences.

The joint venture has been a phenomenal success:

- Over 9,000 international students have been taught and served by the INTO OSU Center.
- Represented in nine of OSU’s academic colleges and across 26 different majors, 80 OSU Ph.D. students started their OSU academic journey in an INTO OSU program.
- Three in five international students at the bachelor’s and master’s level have studied in an INTO OSU program. This was achieved through 17.2 percent growth in international enrollment since 2009, double the international growth of OSU’s Pac-12 peers.
• 2,000 OSU domestic students have lived with an INTO OSU international student in on-campus residence halls.

• The INTO OSU Cultural Ambassador Conversant Program has successfully initiated over 14,000 global conversations between an international student and a domestic student or local community volunteer since 2008.

• Students from more than 130 countries have studied on the Corvallis campus since INTO OSU assumed the lead for international recruitment activities.

• Graduate pathway progressors earned an average final GPA of 3.44 in their master’s program upon graduation in 2016-17.

• In 2016-17, international enrollments contributed $145 million to the state of Oregon. This supported over 1,900 jobs, more than any other higher education institution in the state.

• 1,530 former INTO OSU students now represent OSU as alumni across the globe after earning over 1,600 degrees. Further, 614 former INTO OSU students have participated in employment opportunities in their field of study through the U.S. Student and Exchange Visitor Program Practical Training since 2008.

• Since the launch of the INTO OSU partnership, students progressing through pathway programs have contributed more than $81 million in net tuition to OSU academic colleges and support units. This revenue resulted in the creation of 100 new tenure-track faculty positions.

OSU’s Office of International Admissions, which is responsible for both direct-admit international students and INTO OSU students, is co-located with INTO OSU in order to ensure close alignment between the university’s admissions processes and INTO OSU’s marketing, recruitment and new student (Academic English and pathways) programs. INTO OSU does not determine OSU’s international admission standards or program requirements, but does advise the university on the quality and competitiveness of OSU’s offerings in the market for international students.
CORE THEME 2 — RESEARCH AND GRADUATE EDUCATION

Oregon State University strives to be a leader in conducting research, producing knowledge and generating innovations that contribute to addressing pressing global challenges, particularly in three signature areas; training the next generation of scientists and scholars; and contributing to the economic growth and prosperity of Oregon and beyond.

Research activity is grounded in the colleges, schools and departments, and secondarily in the centers and institutes. Aiding the research of faculty, graduate students, postdoctoral scholars and undergraduates is a long-standing culture of low disciplinary walls and a high spirit of collaboration. This collaborative atmosphere is a key reason faculty across a range of disciplines, from STEM to social sciences and liberal arts, decide to take a position at OSU.

OSU is one of only two land, sea, space and sun grant universities in the United States. As such, research and graduate education are interconnected and essential components of the university’s mission and commitment to student success and research. Research also supports undergraduate students and creates a mechanism for them to explore graduate opportunities. The three objectives outlined in Core Theme 2 support OSU’s mission. Further, the 16 indicators of achievement are in alignment with the strategies and metrics delineated in SP3.0. The strategic plan and associated indicators are made available to appropriate constituencies on the Office of the Provost website. The information below provides additional detail regarding the results of assessments for Core Theme 2 objectives and indicators.

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### Objective 2.1: Create and maintain a diverse research and scholarship environment that consistently achieves high impacts.

There are many areas of OSU that demonstrate diverse research and high impact. Some of the most salient are its ranked colleges and programs. In 2017, the College of Forestry ranked second in the world; the oceanography program in the College of Earth, Ocean, and Atmospheric Sciences ranked third in the world; the College of Agricultural Sciences ranked tenth in the nation; and Ecampus online liberal arts degree ranked first in the nation. In addition, OSU’s robotics program, which began six years ago, is ranked fourth in the nation.

Beyond these rankings, examples which demonstrate the breadth and magnitude of OSU’s research and scholarship activity are provided through indicators of achievement tied to this objective.

While federal funding will remain a primary source of research revenue, with 45 percent of federal funding coming from the National Science Foundation (NSF), there is an opportunity to diversify the types of agencies from which OSU seeks funding:

1. Targeting agencies through strategic engagement and lobbying. Examples include the Department of Defense and Department of Energy, where OSU currently receives only 6 percent and 4 percent of its research funding, respectively.

2. Devising strategies to obtain funding from health- and medical-centric agencies such as the National Institutes of Health (NIH).

3. Training faculty to be successful in writing winning proposals and successfully engaging funding program directors.

The six indicators of achievement for Objective 2.1 provide data and examples that demonstrate OSU’s ongoing commitment and many efforts to create and sustain a strong research and scholarship environment that benefits students, faculty, staff and stakeholders in Oregon and beyond.

**Indicator 2.1.1: Grant and contract expenditures: Total and normalized**

OSU has seen increases in total research and development (R&D) revenue over the past three fiscal years; revenue totals have increased by 34 percent and include the National Science Foundation (NSF) regional ocean-going research vessel award of $121 million in 2017 and $88 million in 2018, with an additional $88 million expected in 2019. Of these awards, the vast majority of funding — 88 percent — is awarded by federal agencies, with only 4 percent coming from industry and 4 percent from state and local government.
Awards that are directly related to sponsored research, total $292 million for 2018, an increase of 45 percent when compared to 2014. This illustrates OSU’s dependence on federal funding, as well as the need to diversify the university’s funding portfolio in light of an anticipated decline in federal funding.

Funding trends over the last five fiscal years by college indicate that the biggest performers in terms of numbers of awards or total dollars awarded are the College of Earth, Ocean, and Atmospheric Sciences (CEOAS), the College of Agricultural Sciences and the College of Engineering. It is important to mention CEOAS is now overseeing the construction and delivery of two and possibly three research vessels, one of which will be operated by OSU as part of the University-Oceanographic Laboratory System (UNOLS). The project, funded by the NSF, is the largest grant in OSU’s history and currently exceeds $200 million.

Also note that the smaller colleges compare very well in terms of awards and expenditures per tenured/tenure-track faculty. When normalized to the number of faculty per college, the College of Pharmacy, College of Forestry and College of Public Health and Human Sciences have very high-performing faculty. In collaboration with the colleges, the Research Office will work to increase opportunities for interdisciplinary collaborations that will engage additional colleges, as well as train new faculty to be successful as quickly as possible with different types of sponsors.

Figure 2.1.1A: Total R&D Award Comparisons
## Effectiveness and Improvement

### FY14 FY18

<table>
<thead>
<tr>
<th>Source</th>
<th>FY14</th>
<th>FY18</th>
</tr>
</thead>
<tbody>
<tr>
<td>Land-Grant Formula Funding</td>
<td>$58,829,591</td>
<td>$69,134,602</td>
</tr>
<tr>
<td>Industry</td>
<td>$36,226,833</td>
<td>$31,432,999</td>
</tr>
<tr>
<td>Nonprofit</td>
<td>$8,550,522</td>
<td>$11,737,836</td>
</tr>
<tr>
<td>Foreign Government</td>
<td>$979,033</td>
<td>$197,150</td>
</tr>
<tr>
<td>State/Local Government</td>
<td>$9,485,376</td>
<td>$12,677,044</td>
</tr>
<tr>
<td>Federal Agencies</td>
<td>$170,547,940</td>
<td>$256,450,159</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$284,619,295</strong></td>
<td><strong>$381,629,790</strong></td>
</tr>
</tbody>
</table>

Source: Research Office Annual Award Data. Note that this data includes sponsored project awards managed in the Research Office, as well as OSU Foundation gifts, testing, licensing revenues in support of industry research, federal and state land-grant formula funding.

Figure 2.1.1B: Total Sponsored Project Award Comparisons

### Total Sponsored Project Award Comparisons

**FY14 and FY18**

- **45% increase between FY14 and FY18**

<table>
<thead>
<tr>
<th>Amount</th>
<th>FY14</th>
<th>FY18</th>
</tr>
</thead>
<tbody>
<tr>
<td>$500,000,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>$450,000,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>$400,000,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>$350,000,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>$300,000,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>$250,000,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>$200,000,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>$150,000,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>$100,000,000</td>
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<td></td>
</tr>
<tr>
<td>$50,000,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>0</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**FY14**
- Foreign Government
- Nonprofit
- Industry

**FY18**
- Federal Agencies
- State/Local Government
Industry-sponsored research has been relatively flat over the last five years. SP4.0 includes an action that will prioritize development of a university-wide industry relations strategy and associated implementation plan to grow this effort. The strategy will focus on growing industry-sponsored research, increasing internships and connections for students, enhancing industry access to services and testing and cultivating gifts.

**Figure 2.1.1C: Industry-Sponsored Research**

<table>
<thead>
<tr>
<th>College</th>
<th>FY14</th>
<th>FY16</th>
<th>FY17</th>
<th>FY18</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agricultural Sciences</td>
<td>$3,026,639</td>
<td>$743,212</td>
<td>$969,661</td>
<td>$719,221</td>
<td>$6,136,270</td>
</tr>
<tr>
<td>Business</td>
<td>$559,428</td>
<td>$35,775</td>
<td>$58,507</td>
<td>$</td>
<td>$653,710</td>
</tr>
<tr>
<td>Earth, Ocean, and Atmospheric Sciences</td>
<td>$79,814</td>
<td>$256,491</td>
<td>$361,312</td>
<td>$181,897</td>
<td>$870,514</td>
</tr>
<tr>
<td>Education</td>
<td>$</td>
<td>$</td>
<td>$</td>
<td>$20,000</td>
<td>$20,000</td>
</tr>
<tr>
<td>Engineering</td>
<td>$2,075,776</td>
<td>$4,195,034</td>
<td>$4,327,015</td>
<td>$3,813,492</td>
<td>$17,673,805</td>
</tr>
<tr>
<td>Forestry</td>
<td>$66,250</td>
<td>$194,912</td>
<td>$36,987</td>
<td>$99,749</td>
<td>$623,097</td>
</tr>
<tr>
<td>Pharmacy</td>
<td>$701,406</td>
<td>$465,998</td>
<td>$273,977</td>
<td>$16,153</td>
<td>$2,497,568</td>
</tr>
<tr>
<td>Public Health and Human Sciences</td>
<td>$26,946</td>
<td>$15,000</td>
<td>$44,000</td>
<td>$83,600</td>
<td>$746,721</td>
</tr>
<tr>
<td>Science</td>
<td>$123,844</td>
<td>$95,004</td>
<td>$23,828</td>
<td>$287,489</td>
<td>$746,721</td>
</tr>
<tr>
<td>Veterinary Medicine</td>
<td>$80,651</td>
<td>$158,447</td>
<td>$433,517</td>
<td>$512,852</td>
<td>$2,001,968</td>
</tr>
<tr>
<td>Other (C&amp;I)</td>
<td>$503,039</td>
<td>$1,032,523</td>
<td>$1,185,981</td>
<td>$411,502</td>
<td>$4,123,135</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$7,234,792</strong></td>
<td><strong>$7,192,396</strong></td>
<td><strong>$7,714,785</strong></td>
<td><strong>$8,086,590</strong></td>
<td><strong>$35,565,512</strong></td>
</tr>
</tbody>
</table>
Another example of high-impact achievement is grant and contract expenditures. Table 2.1.1D demonstrates OSU’s sustained growth in grant and contract expenditures over the past five years. Overall expenditures have increased. Looking forward, OSU has had record-breaking award totals for the past three years, and those expenditure totals typically lag award totals by approximately two years. It is therefore expected that OSU’s research expenditures will follow the increase in award totals. The normalized expenditures shown below also demonstrate that the research expenditures per research faculty FTE have increased significantly in the past three years.

Table 2.1.1D: Grant and Contract Expenditures: Total and Normalized by Research Faculty FTE

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Research expenditures from grants and contracts</td>
<td>$240.5M</td>
<td>$232.7M</td>
<td>$231.0M</td>
<td>$245.3M</td>
<td>$254.3M</td>
<td>$270.3M</td>
<td>$263.4M</td>
</tr>
<tr>
<td>Research faculty FTE*</td>
<td>648</td>
<td>632</td>
<td>656</td>
<td>655</td>
<td>686</td>
<td>665</td>
<td>659</td>
</tr>
<tr>
<td>Research expenditures per research faculty FTE</td>
<td>$371,142</td>
<td>$368,196</td>
<td>$352,134</td>
<td>$374,504</td>
<td>$370,700</td>
<td>$406,466</td>
<td>$399,697</td>
</tr>
</tbody>
</table>

*The number of research faculty was determined by looking at the number of discrete faculty members receiving awards in a given fiscal year.

Indicator 2.1.2: Private sector research, testing, activity and licensing agreements: Licenses/options and industry contracts

Extending beyond faculty research outcomes and grants, OSU’s diverse and high-impact research environment is also evidenced by programs such as OSU Advantage, which connects business with faculty expertise, student talent and world-class facilities to find research solutions, bring ideas to market and launch companies. The Advantage partners with colleges from across the university to increase institutional engagement with the private sector in research, testing and licensing, both to existing companies and through startups.

As a result of recognized needs, OSU launched the Advantage Accelerator in 2013 to help develop high-growth, innovative products and services by taking companies through all phases of the startup process. The Advantage Accelerator assists faculty, staff, students and the broader community in commercializing research and concepts. Advantage Accelerator staff, mentors and student interns work directly with innovators and entrepreneurs to explore markets, develop products and obtain customers. In 2017, the Advantage Accelerator earned a top-10 ranking by a leading online network for angel investing, a type of seed money investing for new companies. Additional details about the OSU Advantage are presented in the Improvements section of Core Theme 3.

During the past five years, OSU has continued growth in private-sector engagement. Below is the five-year average for each indicator:

- **Private-Sector Research**: $6,045,712 (approximately at the national average for land grant universities without a medical school)
- **Private-Sector Testing**: $12,984,450 (approximately at the national average for land grant universities without a medical school)
• **Private-Sector Licensing Agreement Revenues**: $5,090,819 (approximately twice the national average for land grant universities without a medical school)

As demonstrated in Table 2.1.2, OSU has also seen substantial growth since 2012 in the numbers of private-sector licenses and options over the past seven years, as well as private-sector industry contracts.

### Table 2.1.2A: Number of Private Sector License/Options and Contracts

<table>
<thead>
<tr>
<th></th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Private-Sector Licenses/</td>
<td>250</td>
<td>312</td>
<td>362</td>
<td>427</td>
<td>424</td>
<td>474</td>
<td>562</td>
</tr>
<tr>
<td>Options (OCCD)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Private-Sector Industry</td>
<td>24</td>
<td>64</td>
<td>126</td>
<td>174</td>
<td>208</td>
<td>191</td>
<td>162</td>
</tr>
<tr>
<td>Contracts (OCCD)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Licensing Revenues

While licensing revenue rose slightly to $4.4 million in FY18 and reached $2.7 million as of December 12, 2018, it remains well below the SP 3.0 target of $10.9 million. Licensing revenue leveraged per appropriated dollar for the statewide public service programs has fallen from a high ratio of 2.92 in FY12 to 2.12 in FY18, well below the goal of 3.0. However, licensing revenue should be normalized with research expenditures and viewed as an average over a five-year period. As such, OSU continues to excel in translating licenses into revenues, providing a five-year average of 2.4 percent over 5 years — well above the national average of approximately 1 percent.

### Figure 2.1.2B: Licensing Revenue

<table>
<thead>
<tr>
<th>College</th>
<th>FY14</th>
<th>FY16</th>
<th>FY16</th>
<th>FY17</th>
<th>FY18</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agricultural Sciences</td>
<td>$2,944,624</td>
<td>$2,674,061</td>
<td>$2,926,233</td>
<td>$2,110,811</td>
<td>$2,330,306</td>
<td>$12,986,034</td>
</tr>
<tr>
<td>Earth, Ocean, and Atmospheric Sciences</td>
<td>$26,893</td>
<td>$21,347</td>
<td>$35,400</td>
<td>$24,623</td>
<td>$15,933</td>
<td>$124,196</td>
</tr>
<tr>
<td>Engineering</td>
<td>$1,556,512</td>
<td>$6,313,124</td>
<td>$345,973</td>
<td>$830,597</td>
<td>$1,253,911</td>
<td>$10,300,117</td>
</tr>
<tr>
<td>Forestry</td>
<td>$718,045</td>
<td>$630,689</td>
<td>$676,769</td>
<td>$773,634</td>
<td>$100,034</td>
<td>$2,899,171</td>
</tr>
<tr>
<td>Pharmacy</td>
<td>$208,276</td>
<td>$226,699</td>
<td>$337,851</td>
<td>$134,222</td>
<td>$300,348</td>
<td>$1,207,396</td>
</tr>
<tr>
<td>Science</td>
<td>$425,920</td>
<td>$312,026</td>
<td>$135,816</td>
<td>$121,379</td>
<td>$157,956</td>
<td>$1,153,096</td>
</tr>
<tr>
<td>Public Health and Human Sciences</td>
<td>$2,035</td>
<td>$4,010</td>
<td>$8,287</td>
<td>$9,583</td>
<td>$7,534</td>
<td>$31,449</td>
</tr>
<tr>
<td>Veterinary Medicine</td>
<td>$</td>
<td>$3,000</td>
<td>$</td>
<td>$</td>
<td>$5,000</td>
<td>$8,000</td>
</tr>
<tr>
<td>Other (C&amp;I)</td>
<td>$55,960</td>
<td>$108,185</td>
<td>$678,108</td>
<td>$73,403</td>
<td>$230,166</td>
<td>$1,145,822</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$5,938,265</strong></td>
<td><strong>$10,293,140</strong></td>
<td><strong>$5,144,438</strong></td>
<td><strong>$4,078,251</strong></td>
<td><strong>$4,401,187</strong></td>
<td><strong>$29,855,822</strong></td>
</tr>
</tbody>
</table>
Indicator 2.1.3: Capacity Grant awards

From the public sector, as a land grant institution, OSU receives Capacity Grants from the USDA – National Institute of Food and Agriculture (NIFA) in various forms to support research and extension activities. Table 2.1.3 demonstrates the stability of OSU’s Capacity Grant funding from 2012-18. Specifically, with the exception of Smith-Lever funds, all areas in 2018 are at or above the funding level in 2012. Animal health and disease has seen the largest increase since 2012. Hatch and Hatch Multistate, McIntire-Stennis, Renewable Resource Extension Act and EFNEP funds have also seen increases compared to 2012, while Smith-Level Special Needs funding has remained stable.

Table 2.1.3: Capacity Grant Awards

<table>
<thead>
<tr>
<th></th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hatch and Hatch Multistate</td>
<td>$3,700,901</td>
<td>$3,389,599</td>
<td>$3,832,998</td>
<td>$3,800,407</td>
<td>$3,788,594</td>
<td>$3,772,009</td>
<td>$3,790,216</td>
</tr>
<tr>
<td>Animal Health and Disease</td>
<td>$53,491</td>
<td>$70,258</td>
<td>$77,515</td>
<td>$73,707</td>
<td>$67,408</td>
<td>$59,612</td>
<td>$71,743</td>
</tr>
<tr>
<td>McIntire-Stennis</td>
<td>$1,061,001</td>
<td>$943,793</td>
<td>$1,096,008</td>
<td>$1,132,839</td>
<td>$1,131,671</td>
<td>$1,109,180</td>
<td>$1,110,635</td>
</tr>
<tr>
<td>Renewable Resource Extension Act</td>
<td>$83,003</td>
<td>$71,622</td>
<td>$89,020</td>
<td>$89,020</td>
<td>$88,454</td>
<td>$88,454</td>
<td>$88,454</td>
</tr>
<tr>
<td>Smith-Lever1</td>
<td>$3,903,899</td>
<td>$3,532,327</td>
<td>$3,996,437</td>
<td>$3,966,671</td>
<td>$3,930,464</td>
<td>$3,905,283</td>
<td>$3,894,625</td>
</tr>
<tr>
<td>Smith-Lever Special Needs</td>
<td>$36,301</td>
<td>$36,301</td>
<td>$36,301</td>
<td>$36,301</td>
<td>$36,301</td>
<td>$36,301</td>
<td>$36,301</td>
</tr>
<tr>
<td>EFNEP</td>
<td>$593,789</td>
<td>$543,808</td>
<td>$600,477</td>
<td>$599,222</td>
<td>$599,222</td>
<td>$599,222</td>
<td>$599,222</td>
</tr>
</tbody>
</table>

1 FY12-16 amounts include FERS and/or CSRS Retire Allocations.

Indicator 2.1.4: Examples of research excellence and innovation in OSU's signature areas of distinction

In addition to quantitative data that demonstrates OSU’s successes creating and maintaining a diverse research and scholarship environment, there are many examples of research excellence and innovation that also support this objective. The university’s research centers and institutes bring together scientists from multiple fields of study for joint research projects clustered around the university’s signature areas of distinction.

In addition to the research and discovery that is conducted in the centers and institutes located within the Research Office (RO), the colleges are also home to faculty research and outreach that reflect the signature areas. The following section provide several examples.
Signature Area of Distinction:
Advancing the Science of Sustainable Earth Ecosystems

**College of Agricultural Sciences**
Changes in environmental conditions and especially climate variability over the coming decades will affect Oregon's agricultural production levels, management/technology alternatives and spatial and locational patterns. John Selker's leadership of the Trans-African HydroMeteorological Observatory and his research on developing systems to monitor weather across sub-Saharan Africa on the scale of every 30 kilometers, is making a profound difference in the lives of farmers and in addressing serious food insecurity in Africa.

**Project CROOS (Collaborative Research on Oregon Ocean Salmon)** brings together fishermen, scientists and regulatory agents to determine best management practices for Pacific salmon stocks. Initiated in 2005 and authorized by the Oregon Legislative Emergency Board in 2006, Project CROOS uses genetic information collected by fishermen and analyzed in Michael Banks' Marine Fisheries Genetics Lab at the Hatfield Marine Science Center to help them target healthy salmon stocks and avoid weak ones. Over the last 13 years, Project CROOS has worked with over 150 fishermen who collect information from each wild Pacific salmon they catch. With careful management, the hope is that many of the 28 distinct Pacific salmon populations currently listed as either threatened or endangered will be able to recover.

**College of Earth, Ocean, and Atmospheric Sciences**
Sponsored by the National Science Foundation, the Ocean Observatories Initiative (OOI) constructed and is now operating a network of science-driven sensor systems to measure the physical, chemical, geological and biological variables in the ocean and seafloor. Greater knowledge of these variables is vital for improved detection and forecasting of environmental changes and their effects on biodiversity, coastal ecosystems and climate. The Pacific Northwest coastal component of OOI, called the Endurance Array, places a series of long-term moorings off the coast of Oregon and Washington. OSU operates and maintains the Endurance Array's surface moorings, profilers with surface expressions and gliders. The University of Washington maintains the parts of the Endurance Array cabled along the seabed to shore. The network of undersea gliders that OSU programs survey the nearshore waters. Gliders transmit data from each of their instruments onshore several times a day. OOI's cyberinfrastructure makes data from all Endurance Array instruments available online in near real time.

**OSU-Cascades**
The Human and Ecosystem Resiliency and Sustainability Lab (HERS) delivers expertise in ecological assessment and monitoring, natural resource conservation and sustainability theory and practice to support evidence-based conservation. This is directly related to OSU's signature area of advancing the science of sustainable Earth ecosystems. Specifically, the HERS lab's applied research projects focused on the response of bats, pikas and the sagebrush steppe ecosystem to changes in the Pacific Northwest provide information that is critical to effective conservation practices in and between protected areas.
Signature Area of Distinction: Improving Human Health and Wellness

College of Engineering
The biosensing contact lens received the 2018 TechConnect National Innovation Award, which selects the top early-stage innovations from around the world from the top 20 percent of annually submitted technologies into the TechConnect World Conference. Rankings are based on the potential positive impact the submitted technology will have on a specific industry sector. The contact lens, which incorporates an array of fully transparent biosensors, has been envisioned as a noninvasive way for people with diabetes to monitor their blood glucose levels through tear fluid.

Carlson College of Veterinary Medicine
Support from and contracts with industry include pharmaceutical company support for RSV and mycobacterial infections. Another promising area for commercial development is in the production of camelid nanobodies for research, diagnostics and treatment. The college is a member of the National Cancer Institute's Comparative Oncology Canine Clinical Trials program and is actively involved in clinical trials for treatment of several different forms of canine cancer. Other oncology clinical trials include collaborations with OSU's Linus Pauling Institute for cancer prevention in dogs using natural compounds such as sulforaphane.

College of Public Health and Human Sciences
The college has been awarded several notable grants that reflect OSU's values and commitment to embracing innovative approaches, conducting community-based research with diverse populations, promoting interdisciplinary collaboration and integrating students. These projects have the potential to improve health and wellness in communities across Oregon and beyond:

- Developmental Exposure to Arsenic and Immune Function in Children, a $1.7 million, five-year study funded by the National Institute of Environmental Health Sciences, National Institutes of Health (NIH).
- Developing a Measure of Self-Regulation for Children at Risk for School Difficulty, a $1.6 million, four-year study funded by the U.S. Department of Education.
- Medicaid Expansion in Oregon: Access and Health Outcomes for Women and Infants, a $1.5 million, five-year study funded by the Centers for Disease Control and Prevention (CDC).

College of Science
The Department of Biochemistry and Biophysics is home to six faculty who study the structure and function of proteins. Proteins are structural components of bone, cartilage and muscle, and they commonly function as hormones, such as insulin. The fundamental interactions between proteins and DNA are crucial to sustaining life, and more than 95 percent of FDA-approved drugs work by altering the function of proteins.

The department has recently created an unnatural protein facility and acquired instrumentation to establish state-of-the-art biological Nuclear Magnetic Resonance (NMR) and X-ray facilities. These investments have enabled the faculty to establish world-leading efforts on intrinsically disordered proteins, genetic code expansion and protein structure analysis. The faculty and their research groups are discovering how proteins participate in the replication of pathogenic viruses such as rabies and Ebola, contribute to the conversion of sounds to hearing, and how they bind selectively to surfaces and change their structures to affect the chemical reactions that allow people to think, feel and enjoy their everyday lives.
Signature Area of Distinction:
Promoting Economic Growth and Social Progress

College of Business
Current thought is that social capital between firms has significant organizational learning and innovation effects. However, the involved process leading to learning and knowledge creation remains complex and mysterious. To explore the process of organizational learning, Yusoon Kim, an associate professor of supply chain and logistics management, is exploring the buyer-supplier inter-firm setting by using inductive qualitative case studies from the automotive industry, including both buyers and suppliers. Preliminary findings indicate that inter-organizational learning takes place through two different feedback mechanisms, single-loop and double-loop. The subject companies studied in this research include some of the global players in the automotive industry, including both OEMs as the buyers and major engineering companies as suppliers.

College of Education
Families Involved in Education: Sociocultural Teaching and STEM, better known as FIESTAS, is a collaborative project between OSU’s College of Education, 4-H Youth Development and the Science and Math Investigative Learning Experiences (SMILE) program. FIESTAS enhances knowledge of STEM-related topics among Latino and historically underrepresented youth in the third to fifth grades. The primary reason for this age range is to reach youth early in their schooling, especially those underrepresented in STEM fields. Because of the changing demographics of the K-12 population, which do not align with the demographic of the preservice teachers, the university believes engagement with culturally and linguistically diverse youth is needed.

College of Liberal Arts
Marta Maldonado, an associate professor of ethnic studies, along with Bradley Boovy, an assistant professor in women, gender and sexuality studies, and Flaxen Conway, a professor of sociology, received a $246,760 grant to study demographic changes in the seafood processing industry on the southern Oregon Coast. As the region’s non-Hispanic white workers age out of the industry, and the population of Latino workers grows, the researchers will help communities maintain a skilled workforce in a cherished industry and welcome the newcomers who will enrich their communities.

College of Forestry
The Tallwood Design Institute (TDI) is a partnership between OSU and the University of Oregon that is focused on developing innovative wood products and building components that can be produced in Oregon. Work involves research projects to drive innovation in and use of engineered wood materials, improve rural economies and allow Oregon to compete in emerging domestic and global markets. The Tall Wood Buildings Research Program, funded by the Agricultural Research Service, now has 20 active projects focused on aspects of mass timber construction that include fire and seismic safety, environmental impacts of buildings, durability, adhesives and coatings, building physics and health and markets and economics.

TDI has established an active peer-to-peer learning community to connect and inform professionals from the architecture, engineering and construction sectors in the Portland metro area. The group has held seven events since October 2017 and has grown to 144 members. In collaboration with the University of Oregon College of Design, the College of Forestry led Oregon timber and wood product executives on a tour of innovative wood manufacturing facilities in Alpine Europe to explore the use of mass timber in architecture.
College of Pharmacy
The college led the effort for OSU to acquire the laboratory operations of the Oregon Translational Research and Drug Development Institute (OTRADI) and retain key personnel. OTRADI was formed as a state-supported signature research center to promote and support commercialization of biomedical discoveries. As the institute’s direction evolved to become a business accelerator, the college and OSU recognized the value of bringing the automated sample-handling systems, high-content imaging equipment, high-throughput screening technology and large chemical libraries to Corvallis, where it could serve as a core resource for the entire campus. Renamed the High Throughput Screening Services Laboratory, this is an important resource for academic investigators and biotech companies in the region and now operates out of the OSU Pharmacy Building.

Indicator 2.1.5 Ratio of tenured/tenure-track faculty to total instructional faculty
Tenured and tenure-track faculty are a vital factor in OSU’s contribution and commitment to diverse research impacts. In addition to instructional and service commitments, tenured and tenure-track faculty have an obligation to be research-active. OSU seeks to maintain a significant ratio of tenured and tenure-track faculty to the overall instructional faculty population. Table 2.1.5 shows the stability of the tenured and tenure-track faculty population over time.

Table 2.1.5: Ratio of Tenured/Tenure-Track Faculty to Total Full-Time Instructional Faculty

<table>
<thead>
<tr>
<th></th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ratio of Tenure/Tenure-Track Faculty to Total Instructional Faculty</td>
<td>0.54</td>
<td>0.66</td>
<td>0.69</td>
<td>0.68</td>
<td>0.67</td>
<td>0.67</td>
</tr>
</tbody>
</table>

Data from IPEDs: faculty status, tenured or on tenure track compared to all full-time instructional staff.

Indicator 2.1.6: Percent of faculty with national/international refereed scholarly publications
OSU faculty contribute to the university’s diverse research impacts in multiple ways. One measure of impact is through peer-reviewed national and international scholarly publications. As demonstrated by the data in Table 2.1.6, over the past seven years, there has been a 20 percent increase in faculty who have had high-impact national or international refereed scholarly publications. While these numbers do not capture the entire breadth of faculty impacts via research, they demonstrate the significant number of faculty at OSU who have achieved high-impact research outcomes that are nationally and internationally recognized.

Table 2.1.6: Faculty with National/International Refereed Scholarly Publications

<table>
<thead>
<tr>
<th></th>
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<th></th>
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<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>% Faculty with Article Published in Calendar Year</td>
<td>57.8%</td>
<td>62.4%</td>
<td>65.5%</td>
<td>66.6%</td>
<td>68.2%</td>
<td>69.2%</td>
<td>69.1%</td>
</tr>
</tbody>
</table>

Fundamental data provided by Academic Analytics LLC.
Summary of Objective 2.1
While the data and examples above serve to demonstrate OSU’s efforts to create and maintain a diverse research and scholarship environment that consistently achieves high objectives, the strategic plan metrics are another consistent data source by which OSU assesses its progress. The goals of SP3.0 align to the core themes and strategic metrics relate to progress in this area. There are two strategic metrics that demonstrate progress relative to Objective 2.1. These are: total research and development (R&D) expenditures and industry-funded research percent of total R&D expenditures. Both of these have seen an upward trend over the past seven years, demonstrating that the ongoing efforts are having positive results and impacts on student learning outcomes, as demonstrated by student participation in examples of research excellence and innovation in OSU’s signature areas of distinction.

Oregon State University strongly fulfills this mission element related to creating and maintaining a diverse research and scholarship environment that consistently achieves high objectives.

Objective 2.2: Attract, retain and support high-quality and diverse students for graduate programs.
OSU is a leader in graduate training and a pioneer in exploring new approaches to graduate education. Additionally, OSU’s graduate programs train a diverse student body in both core disciplinary principles and employment-relevant skills while also encouraging collaboration and effective communication across disciplines to solve complex societal problems. The six indicators of achievement for Objective 2.2 demonstrate OSU’s advances in attracting, matriculating, retaining and increasing graduate student diversity.

Indicators of achievement for this objective seek to demonstrate efforts toward attracting, matriculating, retaining and increasing graduate student diversity.

Indicator 2.2.1: Graduate students and historically underrepresented students
Over the past seven years, the number of underrepresented graduate students has increased for both total graduate students and for professional doctorate students as demonstrated in Figure 2.2.1A. While small, the share of underrepresented graduate students relative to the overall enrollments in doctoral and master’s programs has increased from 7 percent to 9 percent over the seven-year period, and the share of underrepresented professional doctoral students has increased from 5 percent to 10 percent for this same time frame. However, in spite of the increase in the percentage, the numbers remain small.

Alternatively, one can examine the growth of historically underrepresented graduate students at OSU. Over this 2012-18 time period, the institution has experienced a 16 percent growth in overall graduate enrollments in doctoral and master’s programs and a 50 percent increase in the growth of historically underrepresented student enrollments in these degree programs. Likewise, there has been a 6 percent growth in overall enrollments in professional doctorate programs, but the growth in enrollment of historically underrepresented students in professional doctorate programs is nearly 100 percent. However, in spite of the increase in share, the numbers remain small.
FIGURE 2.2.1A: Graduate Student Enrollment By Graduate Student (Master’s, Doctoral and Nondegree) and Professional Doctorate (Doctor of Pharmacy, Doctor of Veterinary Medicine): Total and Historically Underrepresented

Source: Institutional Research Fall 4th-week census enrollment for main campus.

One mechanism that demonstrates OSU’s ability to attract, retain and support high-quality and diverse students for graduate programs is the yield rate of newly admitted graduate students and for historically underrepresented graduate students.

Annual data profiles provided by the Graduate School include admission data disaggregated by degree level, race/ethnicity, gender and citizenship for each stage in the admission process (applicant, admission, matriculation). These data are also produced and evaluated in relation to the overall OSU graduate perspective. As presented in Figure 2.2.1B, the yield rate for historically underrepresented students and for graduate students overall has remained relatively stable over the past seven years.
Figure 2.2.1B: Graduate Student Enrollment: Total and Historically Underrepresented Students

<table>
<thead>
<tr>
<th>Academic Year (Summer to Spring Term)</th>
<th>Percent of graduate students admitted to summer or fall term enrolling in academic year.</th>
<th>Percent of underrepresented graduate students admitted to summer or fall term enrolling in academic year.</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011-12</td>
<td>64%</td>
<td>67%</td>
</tr>
<tr>
<td>2012-13</td>
<td>64%</td>
<td>64%</td>
</tr>
<tr>
<td>2013-14</td>
<td>64%</td>
<td>67%</td>
</tr>
<tr>
<td>2014-15</td>
<td>64%</td>
<td>62%</td>
</tr>
<tr>
<td>2015-16</td>
<td>64%</td>
<td>58%</td>
</tr>
<tr>
<td>2016-17</td>
<td>66%</td>
<td>64%</td>
</tr>
<tr>
<td>2017-18</td>
<td>66%</td>
<td>60%</td>
</tr>
</tbody>
</table>

Although academic colleges and their subunits have their own recruitment efforts, the Graduate School uses a multidimensional approach to increase the yield rate of a diverse graduate student population. Examples of the innovative efforts include the following:

- The Graduate School has been collaborating on a future Memorandum of Understanding (MOU) with Florida A&M University, a top public historically black university, to focus on the recruitment of historically underrepresented students. The goal is that this initial MOU can serve as a model for establishing collaborative relationships with other institutions that serve high numbers of diverse students in the future.
- OSU has launched a Graduate Student Ambassador Program designed to connect prospective students with current OSU graduate students. The program provides prospective and current graduate students with positive peer relationships that promotes a more involved community on campus. In addition to fostering positive relationships with students on campus, ambassadors travel to conferences and events representing OSU.
- The Graduate School is recruiting high-quality and diverse students both on and off campus. On campus, staff connect and hold information sessions with established groups such as McNair Scholars, CAMP, TRIO, Honors College, Women in STEM, STEM Leaders Program and LSAMP. Off campus, staff attend conferences geared toward diverse, historically underrepresented and first-generation prospects they would like to attract, attending SACNAS, MURDOCK, ABRCMS, SHS, REU and Cal Diversity conferences.

**Indicator 2.2.2: Ratio of doctoral degrees awarded to all degrees awarded**

Building on the previous indicator, another measure that demonstrates OSU’s commitment to training the next generation of scientists and scholars is the ratio of doctoral degrees awarded as compared to
all degrees awarded. OSU is actively working to build its doctoral program offerings. As demonstrated in Table 2.2.2, OSU’s ratio of doctoral degrees as compared to all degrees has remained stable over the past several years.

Table 2.2.2: Ratio of Doctoral Degrees Awarded to All Degrees Awarded

<table>
<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>Ratio of Doctoral</td>
<td>0.07</td>
<td>0.07</td>
<td>0.06</td>
<td>0.06</td>
<td>0.06</td>
<td>0.06</td>
</tr>
<tr>
<td>Degrees to All</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Degrees Awarded</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Data from IPEDs: number of students receiving a doctoral degree (including professional doctoral degrees) compared to number of students receiving all degrees combined (doctoral, master’s, bachelor’s, post-baccalaureate or certificate).

**Indicator 2.2.3: Proportion of graduate students supported by assistantships or university fellowships**

Additional data included in the graduate program annual data profiles provides graduate student funding support trend data, disaggregating by degree level, type of support and general sources of support. Graduate assistantship data are broken out by level of support in the form of percent FTE funding and aggregated salary groupings. Other stipends, tuition waivers and scholarship details are also provided. The Graduate School is working with the Office of Institutional Analytics and Reporting (IAR) to develop a subsequent graduate student funding report with additional detail. Figure 2.2.3 reflects trends in the proportion of degree-seeking graduate students supported by graduate assistant appointments.

**Figure 2.2.3: Percent of Degree-Seeking Graduate Students Supported by a Graduate Assistantship (GRA/GTA) Appointment**

The number of graduate assistantship positions remains relatively stable and supports just over half of OSU’s degree-seeking graduate student population. The proportion of doctoral students supported on graduate assistantships or university fellowships is greater, at approximately 70 percent.

Many of the programs, as documented in their required biennial self-evaluation reports, discuss barriers to attracting diverse applicants. Adequate student funding and support, in relation to other institutions,
is a recurring theme. Some programs have become more creative in addressing this issue and have
developed relationships with industry and/or found other sources of grant dollars to support their
graduate students.

Although the Graduate School is not involved in the distribution of graduate assistantships (Teaching
Assistants and Research Assistants), the Graduate School provides leadership for many university
fellowships and scholarships. In order to become more competitive and increase yield rates, the Graduate
School conducted an internal review of its scholarship and fellowship material, improved the clarity and
dissemination of information provided to potential applicants and nominating faculty, and modified the
award cycle timeline. Additionally, the Graduate School streamlined the overall review and decision-
making process. These efforts have increased the impact and efficiency in all stages of the applicant and
award process. The Graduate School provides funding to recruit historically underrepresented students
through scholarship awards, as well as to recruit high-achieving students through several merit-based
awards.

Finally, the Graduate School developed an array of professional development offerings to support
graduate programs and their students in grant writing, securing funding, writing and overall graduate
student productivity. Greater detail on professional development can be found under Objective 2.3.

**Indicator 2.2.4: Eight-year graduation rates: All doctoral students and underrepresented students**

Graduate student retention and outcome data are also included in the Graduate School’s annual data
profiles. Eight-year graduation rates for doctoral students are categorized by regulatory race and provided
for each program. Additional data summaries provided include breakdowns by gender, residency and
degree type (i.e., Ed.D., Ph.D.), as well as retention rates and the amount of time spent toward degree
completion. The Graduate School is partnering with the Office of Institutional Analytics and Reporting
(IAR) to create additional filtering capabilities and visual dashboards. The stable trend of doctoral
graduation rates split by total and historically underrepresented students can be found in Figure 2.2.4.
Figure 2.2.4: Eight-Year Graduation Rates for All Doctoral Students and for Historically Underrepresented Students

![Eight-year Doctoral Graduation Rate](image)

Indicator 2.2.5: Four-year graduation rates: All master’s students and historically underrepresented students

Four-year graduation rates for master’s students are categorized by regulatory race and provided for each program. Additional data summaries provided include breakdowns by gender, residency and degree type (i.e. MBA, MEng, etc.), as well as retention rates and the amount of time spent toward degree completion. The stable trend of masters’ graduation rates split by total and historically underrepresented students can be found in Figure 2.2.5.
Indicator 2.2.6: Share of grants with funding support provided for graduate students

Collaboration between graduate students and faculty and staff is critical to OSU’s research enterprise and R1 status, as well as to graduate student training. Although graduate students have a variety of funding sources, including self-funding, teaching assistantships and grant funding, the share of grants with funding support provided for graduate students is a key measure of graduate student involvement in the research enterprise. As Table 2.2.6 shows, the share of grant, with funding support for graduate students, has increased over time, even though federal funding for research has become more competitive over this same time period.

Table 2.2.6: Share of Grants with Funding Support Provided for Graduate Students

<table>
<thead>
<tr>
<th>Year</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grants with Paid Graduate Students</td>
<td>25%</td>
<td>26%</td>
<td>27%</td>
<td>27%</td>
<td>29%</td>
<td>30%</td>
<td>30%</td>
</tr>
<tr>
<td>Total Number of Grants</td>
<td>3,247</td>
<td>3,189</td>
<td>2,933</td>
<td>3,035</td>
<td>3,102</td>
<td>3,141</td>
<td>3,220</td>
</tr>
</tbody>
</table>

Summary of Objective 2.2

The data and examples above demonstrate efforts to attract, retain and support high-quality and diverse students for graduate programs. While the matriculation of graduate students from historically underrepresented students has remained fairly constant in percentage terms, it averages 4 percentage points below the matriculation rates for all graduate students. OSU has identified and launched efforts to increase recruiting and matriculation of a more diverse graduate student body. Graduation rates for
historically underrepresented graduate students remain below graduation rates for all students, with the largest gaps in the doctoral eight-year graduation rates. The institution remains committed to supporting graduate students; approximately 70 percent of doctoral students receive graduate assistantships or fellowships. The Graduate School provides funding to recruit historically underrepresented students and high-achieving students.

Strategic plan metrics provide a consistent data source by which OSU assesses its progress overall. There are three strategic metrics that demonstrate progress relative to Objective 2.2: master’s and doctoral degrees awarded (as part of the total degrees awarded metric), doctoral degrees awarded and total R&D expenditures. All three metrics have been trending positively the past seven years. This, along with the indicators of achievement and examples of efforts, demonstrate that OSU is making progress toward this objective.

Oregon State University fulfills this mission element related to attracting, retaining and supporting high-quality and diverse students for graduate programs. A key area for improvement is to develop Graduate School and college partnerships to address the gap between doctoral graduation rates for historically underrepresented students and all doctoral students.

Objective 2.3: Provide high-quality training to support graduate students’ degree completion and prepare them for post-graduation opportunities.

The four indicators of achievement for Objective 2.3 demonstrate that OSU provides high-quality, innovative resources and initiatives to graduate students during their academic careers and beyond.

Indicator 2.3.1: Percentage of active graduate programs that have completed full-cycle program reviews

One mechanism to assess the high-quality academic programs offered to graduate students is through full-cycle reviews of all graduate programs. OSU is committed to a review program and has a robust, full-cycle, iterative system established for graduate student learning assessment and program evaluation. Responsibility for graduate-level assessment is shared by the individual graduate programs, the Graduate School, the Graduate Council of the Faculty Senate and the Office of Academic Program and Assessment (APA). The Graduate School coordinates with other campus units to compile, analyze and provide to programs a core set of performance metrics in graduate education that guide their evaluative reflections as individual programs. The Graduate School and the Graduate Council consider opportunities to revise, advance and/or restructure graduate education in light of assessment data.

The assessment review process for graduate education is multi-dimensional and consists of five separate processes:

- **Program-Level Evaluation:** Every two years, programs are required to submit an evaluation report that critically examines a suite of 10-year core performance metrics specific to each program. The data, supplied by the Graduate School, provide a comprehensive review of the graduate student life cycle, including applications, admissions, course offerings, student retention and degree completion. The associate dean of the Graduate School tracks compliances and reviews each report. The biennial reports are submitted to the Graduate School via Qualtrics. Academic programs upload their report to their assessment folder in SharePoint. The biennial report is used to inform the 10-year program review.
• **Graduate Student Learning Assessment:** Every graduate program submits a Graduate Learning Outcome (GLO) assessment report each spring. The assessment plan, data collection and report require programs to reflect on not only students’ mastery of specified GLOs, but also the intersection of GLO achievement and strategic planning at the program level. The Graduate School’s associate dean tracks compliances, reviews each report and writes a feedback report to the program addressing areas of strength and suggestions for improvement. Programs upload their GLO report to their assessment folder in SharePoint. The GLO report is used to inform the 10-year program review.

• **Decadal External Reviews:** All graduate programs undergo an external review every 10 years. External reviews may result in one of six primary recommendations by the review panel: expansion, maintenance, restructuring, reduction, temporary suspension or discontinuation. If there is evidence that a program is not meeting university GLOs, program GLOs or other expectations of high-quality programs, the dean of the Graduate School may request an out-of-cycle review. The dean, in partnership with Graduate Council, tracks compliance. The Graduate School maintains the schedule of program reviews. Programs upload their 10-year review material to their assessment folder in SharePoint.

• **New Program Proposals:** All new graduate programs must undergo a Category I review process. Numerous committees and units such as the Faculty Senate Graduate Council, Faculty Senate Curriculum Council and Faculty Senate carefully review these proposals. New graduate programs must have an external review and receive approval from the state's Higher Education Coordinating Commission (HECC). The Category I proposals are stored in the university’s Curriculum Proposal System (CPS).

• **Course-Level Assessment:** All courses undergo a Category II process, in which the Graduate Council and Curriculum Council of the Faculty Senate, in conjunction with APA, review all new proposals for graduate-level courses. During the review process, course learning outcomes are carefully examined to ensure appropriateness to the degree level, relevance to mastery of subject material and preparation in meeting university- and program-specific GLOs.

These scheduled assessment and program review activities allow programs to critically examine program objectives, curricula, resources, student data and other relevant qualitative and quantitative materials. The ongoing full-cycle assessment process, which includes stakeholders from across the university and the external community, ensures that the education students receive is relevant, high-quality and aligned with stated learning outcome objectives.

Each of the five assessment processes also result in programs making necessary programmatic changes. For example, the yearly GLO assessment requires that programs examine whether students are meeting the program’s objectives as measured by the assigned assessment tool and benchmark. Programs can make more immediate adjustments (i.e., course changes) to address issues that arise, rather than wait for the 10-year review.

The 10-year program review involves program faculty, the Faculty Senate, Graduate School, the college dean, external reviewers, students and other relevant stakeholders. The program review process starts approximately one year prior to the site visit, with the program preparing a self-study document. Once the program receives the reviewers’ report and develops an action plan, the Graduate School and Graduate Council work with the program to ensure programmatic adjustments are in line with action plans. A three-year follow-up is conducted to monitor compliance.
When the current associate dean of the Graduate School started in 2016, a number of programs were delayed in their reviews. The Graduate School put together a plan to catch up all programs, which are now current and on-cycle. Table 2.3.1 shows OSU has reached nearly 100 percent completion each year for the past three years.

### Table 2.3.1: Percent of Graduate Programs in Compliance with Full-Cycle Program Reviews

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</thead>
<tbody>
<tr>
<td><em>Percent of Graduate Programs in Compliance with Full-Cycle Program Review Cycle</em></td>
<td>Plans Developed</td>
<td>50%</td>
<td>&lt;75%</td>
<td>75%</td>
<td>85%</td>
<td>90%</td>
<td>100%</td>
</tr>
</tbody>
</table>

*Includes one-year extensions granted by the dean of the Graduate School and off-cycle adjustments to coordinate multi-program reviews.

**Indicator 2.3.2: Enrollment in the Graduate Certificate in College and University Teaching (GCCUT) program**

Another way OSU provides high-quality support to graduate students is by offering the Graduate Certificate in College and University Teaching (GCCUT) program, an 18-credit certificate that provides advanced coursework and experiential learning opportunities to graduate students who plan to teach in higher education settings or need teaching or facilitation skills for other careers. Enrolling a cohort of online and site-based students each year and awarding the certificate adds value to the discipline-specific training graduate students receive in their academic programs. The GCCUT program provides formal instruction, experiential opportunities and faculty feedback related to the development of graduate students' teaching and facilitation skills. Doing so also assists graduate students in their teaching assistantship appointments, which are vital in providing financial support and professional development while enrolled at OSU. Beyond degree completion, the GCCUT program helps prepare graduate students for diverse careers in working with adult learners, including positions in academia, business and industry, government and nonprofit agencies.

Assessing enrollment and completion trends relative to the GCCUT program informs future decision-making about program demand and capacity, as well as the frequency with which coursework should or may be offered and the potential timing of these offerings. Additionally, enrollment and completion data guide program staff in enacting appropriate and timely outreach to support students' completion. As demonstrated in Table 2.3.2, enrollment in the GCCUT program has increased significantly since 2013-14, from 25 students to 83 students. GCCUT certificates awarded have seen a jump from 10 in 2013-14 to 23 in 2017-18. To date, 110 students have completed the program, with typically 20 to 30 students earning certificates in any given academic year. GCCUT is a two- to three-year certificate program, often completed in tandem with a primary degree. Average time to certificate completion is 4.8 academic terms for site-based students and 3.25 terms for online students.

Finally, the GCCUT program director reviews data regarding enrollment and completion and shares summary information at quarterly program faculty meetings. The director also develops an annual report providing a comprehensive overview of GCCUT admissions, enrollment and completion information that is shared with Graduate School leadership.
Table 2.3.2: Enrollment in the GCCUT Program

<table>
<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>Enrollment in GCCUT Program(^1)</td>
<td>25</td>
<td>48</td>
<td>61</td>
<td>69</td>
<td>83</td>
</tr>
<tr>
<td>GCCUT Certificates Awarded</td>
<td>10</td>
<td>18</td>
<td>26</td>
<td>26</td>
<td>23</td>
</tr>
</tbody>
</table>

\(^1\)Fall census data/any primary or secondary major/any student level (master’s doctoral, non-degree).

Source: OSU Institutional Research

Indicator 2.3.3: Participant counts in graduate student professional development

Graduate students’ participation in professional development activities offered via OSU’s Graduate School and institutional partners provides students with opportunities to hone skills that complement their discipline-specific training. Data related to graduate students’ participation in professional development activities is also collected and tracked. For participation in for-credit professional development courses offered through the Graduate School, staff generate a report to determine actual enrollment in all courses beginning with the Graduate School’s course designator (GRAD). Enrollment data gathered as a result of this query reflect both distance and site-based/on-campus students, and they are duplicated if a student is enrolled in more than one GRAD course. For participation in not-for-credit professional development experiences (e.g., workshops, seminars and writing groups), attendance is tracked by event. Graduate School staff track participation manually in some cases and electronically in other instances. As with GRAD-designator classes, the participation data do not necessarily reflect unduplicated participants.

These opportunities support graduate students in duties related to their OSU graduate appointments (i.e., GRA or GTA) in producing high-quality scholarship and also help prepare students for diverse careers paths that require a range of knowledge and skills.

Assessing participation in graduate student professional development activities informs decision-making about formal course offerings as well as graduate students’ interests and emergent needs with respect to future training. Additionally, ongoing assessment provides insight into gaps that may exist in training provided by graduate students’ academic disciplines or external granting agencies. This process guides Graduate School staff in developing partnerships across the institution to best support any unmet needs or to eliminate redundancies.

Graduate School staff review GRAD course enrollments quarterly and use data to make decisions about future course offerings. For the not-for-credit offerings, Graduate School staff and their partners report on individual event participation quarterly. In both cases, Graduate School staff share this information with key institutional stakeholders and Graduate School leadership. Table 2.3.3 demonstrates the increase in participation in professional development seminars and activities, as well as enrollment in courses with GRAD designation between 2015-16 and 2017-18.
Table 2.3.3: Participation in Graduate Student Professional Development

<table>
<thead>
<tr>
<th></th>
<th>2014-15</th>
<th>2015-16</th>
<th>2016-17</th>
<th>2017-18</th>
</tr>
</thead>
<tbody>
<tr>
<td>Participant Attendance in Graduate Professional Development Seminars/Activities(^1)</td>
<td>N/A</td>
<td>1,307</td>
<td>1,545</td>
<td>2,035</td>
</tr>
<tr>
<td>Enrollment in Graduate Professional Development Courses with GRAD Designation(^2)</td>
<td>425</td>
<td>461</td>
<td>397</td>
<td>537</td>
</tr>
</tbody>
</table>

\(^1\)Activities such as graduate student orientation, research integrity, literature review, writing grants, fellowships, etc.

\(^2\)Courses such as graduate writing, preparing an IRB submission, research data management, etc.

**Indicator 2.3.4: Examples of resources to support graduate students during their academic careers and beyond**

In addition to collecting data to assess student success, the Graduate School also provides many resources to support graduate students from entry to degree completion. The resources and support programs contribute to successful onboarding of new graduate students, ongoing academic success, degree completion, opportunities for interdisciplinary dialogue and career and professional skills development. Example of support resources and initiatives include:

- Graduate Welcome Week, including new graduate student orientation and resource fair, library workshops and Graduate Teaching Assistant (GTA) orientations.
- GTA trainings with information sessions covering instructional policies and procedures and equity literacy in college teaching; Ecampus training for GTAs who teach online courses.
- Graduate Student Success Center (GSSC), a study space and lounge exclusively for graduate students, with weekly drop-in and consultation appointments with experts on graduate writing, research librarians, Institutional Review Board (IRB) and statistics.
- Customized workshops targeted to students and/or faculty audiences on topics related to supporting degree completion, writing and graduate advising.
- Graduate Student Ambassadors program and the Graduate Student Advisory Council (GSAC), both providing leadership opportunities for students.

The data used to inform graduate success programming initiatives include Council of Graduate Schools reports on the professional skills needed in today’s job market, event evaluation data, university campus climate survey data and biannual current graduate student survey data (survey currently under revision). Information about these programs is widely available and prominent on the Graduate Student Success website.

**Summary of Objective 2.3**

The data and examples above demonstrate ongoing efforts to provide high-quality programs, training and support to graduate students and prepare them for post-graduation opportunities. Over the past three years, the institution has focused on conducting full-cycle program reviews and has updated the assessment review process. All new graduate programs are required to undergo an internal review process that focuses on clarity of student learning outcomes. The Graduate School has also developed the Graduate Certificate in College and University Teaching (GCCUT) program, which is available to all graduate students and prepares them for diverse careers in working with adult learners including...
positions in academia, business and industry, government and nonprofit agencies. In four years, the enrollment in this certificate has increased threefold. Participation in professional development seminars and enrollment in graduate-level professional development courses has also seen a significant increase.

While there is always room for improvement, OSU has demonstrated a strong commitment to maintaining high-quality graduate programs and providing professional training. OSU fulfills this mission element to provide high-quality training to support graduate students’ degree completion and prepare them for post-graduation opportunities.

CORE THEME 2: IMPROVEMENTS

Research, Scholarship and Innovation

Centers and Institutes: There are 19 research centers and institutes at Oregon State University, including the Center for Genome Research and Biocomputing, the Center for the Humanities, the Center for Lifelong STEM Learning, the Hatfield Marine Science Center (HMSC), the Institute for Natural Resources, the Institute for Water and Watersheds, and the Linus Pauling Institute. These entities provide students and faculty with unique opportunities to build collaborations, conduct interdisciplinary research and attract extramural support. Core facilities provide the spaces and labs to conduct cutting-edge research and enable student and faculty success. Beginning in 2019, to ensure resources are being used effectively to advance the university’s research enterprise and the goals of SP4.0, all centers, institutes and core facilities will be subject to rigorous, periodic reviews. The results of these careful assessments of goals, strategies and accomplishments will inform resource allocation decisions and investments going forward.

The College of Earth, Ocean and Atmospheric Sciences (CEOAS) is a leader in the development of state-of-the-art research platforms that enable unparalleled environmental measurements and reveal the complexity of the natural world, including the human dimension. CEOAS faculty and students work in many different regions of the world, but the college has considerable strength in the field of coastal ocean science. As part of this strength, OSU is leading the charge to design and deliver the next generation of research vessels that will advance coastal science through the Regional Class Research Vessel (RCRV) project. Each vessel, designed with environmentally conscious and acoustically quiet features, will serve as highly advanced platforms by which the latest breakthroughs in marine research are achieved.

Fellows of the American Association for the Advancement of Science (AAAS): In December 2018, three OSU College of Science researchers — Mas Subramanian, Michael Freitag and David Maddison — were named fellows of the American Association for the Advancement of Science in recognition of their extraordinary achievements in scientific advancements. The AAAS is the world’s largest multidisciplinary scientific society and denotes fellows based on “efforts toward advancing science applications that are deemed scientifically or socially distinguished.” This is the first time in OSU history that three faculty from a single college have been named fellows in one year, and it is the fourth time there have been three or more OSU faculty named fellows in one year.

Subramanian, the Milton Harris Professor of Materials Science at OSU, was honored for his contributions to the field of materials chemistry, which includes the discovery of YInMn blue, a stable, heat-resistant, nontoxic, infrared-reflecting pigment. Freitag, a professor of biochemistry and biophysics and a fellow of the American Academy of Microbiology, was selected for having discovered a way to tap into the ability of fungi to produce new molecules that could be of high medical importance. Maddison, a professor of integrative biology and holder of the Harold and Leona Rice Professorship of Systematic Entomology, was honored for his work in phylogenetic systematics, including advances in beetle evolutionary biology and
contributions to the development of software tools that revolutionized how phylogenies are studied.

Subramanian, Freitag and Maddison are among the 446 AAAS members honored in 2018 and join 13 other faculty in the College of Science who are AAAS fellows. Overall, 36 professors at OSU have held this honor since 1965.

**Accessibility of Transformative Graduate Education to All Learners**

In collaboration with graduate faculty, the Graduate School supports students in all aspects of their education by providing financial support, creating opportunities to develop the skills needed for career success, and ensuring that all programs engage in continuous improvement. This will attract a diverse, high-achieving student body that advances the research agenda, as well as assure current and future students that they are receiving a compelling, high-quality graduate experience — one that prepares them to generate new knowledge, educate others, achieve positive societal and global impacts, and become leaders in innovation.

The Graduate School saw several related highlights in the 2015-16 academic year, most of which have steadily improved in the 2016-17 academic year. In 2015-16, 4,545 graduate students enrolled at OSU, comprising 15 percent of the total student body. Of these, 12 percent were historically underrepresented students, 30 percent were international students, and there were 1,882 graduate assistants (including both research and teaching assistants). The Graduate School held 15 professional development workshops and events (along with 15 postdoctoral seminars) focusing on writing, careers, research, communications, leadership and teaching, and there were 120 room reservations in the Graduate Student Success Center (GSSC). In 2016-17, enrollment increased to 4,675 graduate students and 14 percent historically underrepresented students. There were 2,050 graduate assistants, 32 professional development events and 284 room reservations in the GSSC.

The Adult and Higher Education (AHE) program in the College of Education is dedicated to adult learning and higher education leadership. Currently, the program offers a doctorate (Ph.D./Ed.D.) and master’s degree (Ed.M.) options. Both AHE programs are delivered through Ecampus and allow students to use their workplace as a laboratory to turn theory directly into practice. The doctoral programs prepare postsecondary education professionals for leadership roles in community colleges, four-year colleges, universities and similar institutions. Doctoral graduates serve as chancellors, presidents, vice presidents, deans, department chairs and faculty throughout the Pacific Northwest and beyond. Among the distinguished alumni are 27 former or sitting community college presidents.

**Research Development Awards and Expenditures Improvements**

OSU is pursuing a number of strategies to diversify funding sources, including:

1. Targeting agencies through strategic engagement and lobbying. Examples include the Department of Defense and Department of Energy, where OSU currently receives only 6 percent and 4 percent of its research funding, respectively.

2. Devising strategies to obtain funding from health- and medical-centric agencies such as the National Institutes of Health (NIH).

3. Training faculty to be successful in writing winning proposals and successfully engaging funding program directors.

**Carlson College of Veterinary Medicine:** The Carlson College of Veterinary Medicine is the only named college at OSU and one of only two named colleges of veterinary medicine in the United States. In 2018,
OSU received a transformative commitment from Gary Carlson, a Portland native and 1974 OSU alumnus who has had a distinguished career as a physician in Southern California. Carlson’s $50 million gift is the largest the university has ever received and will dramatically increase the college’s ability to provide professional education for future veterinarians, lifesaving clinical care and research that is critical to animal and human health. It will establish an endowed fund to increase recruitment and retention rates of top-tier faculty in the veterinary medicine field, double the size of the OSU Small Animal Hospital and support the college’s strategic direction and priorities. The college increased its class size from 56 to 72 students in the fall of 2017. In 2016, 100 percent of OSU’s graduating class passed their National Board of Veterinary Medical Examiners (NAVLE) exams, surpassing the Council on Education standard of 80 percent.

CORE THEME 2: CHALLENGES

Review of Research Office Processes, Policies and Efficiencies: In fall 2018, the Research Office (RO) began benchmarking its structure and operations against peers, gathering input from RO staff and campus stakeholders and reviewing feedback on the OSU research enterprise assembled through the SP4.0 development process. This effort is ongoing, but results thus far are suggesting a number of ways faculty can be better supported in their research endeavors.

An area of particular concern identified by faculty is growing administrative burden around compliance, both due to the increasing number of federal regulations and the implementation of those regulations by the RO and other entities on campus. For example, there are over 70 federal regulations governing federal research funding, and the number continues to increase. The RO has implemented a few changes over the last several years to mitigate the compliance burden, but there is more that can be done. One challenge is that the RO has tended to take a very risk-averse approach to compliance, placing a heavy burden on faculty and potentially depressing contracts and grants activity. The assessment thus far suggests there is room for more balance. Advisory groups comprised of faculty, research administrators and business center staff affiliated with the colleges have been formed to work with the three main functions of the Research Office (OSRAA, ORI, OCCD) to review processes and look for ways to introduce appropriate flexibility in interpreting the regulations and compliance options.
The Oregon State University Graduate School is keenly aware that academic programs do not always possess the expertise or bandwidth to offer professional development training that focuses on the soft skills — such as presentation, teamwork and networking — that graduate students need to be competitive in the global economy. Based on national recommendations from key graduate organizations, the Graduate School expanded its professional development curriculum to enhance the marketability of graduates by collaborating with campus colleagues to provide additional professional development activities via credit-bearing courses and certificate programs, workshops, special events and drop-in and scheduled appointments at the Graduate Student Success Center (GSSC). In tandem with Counseling and Psychological Services (CAPS) and the Career Development Center (CDC), the Graduate School also offered new professional development programming, including a three-part communication workshop series, specifically to support international graduate students.

Playing an essential role in advancing the university’s mission to ensure the success of all students, the OSU Graduate School offers a variety of avenues for staff and faculty to connect with different graduate audiences and support their educational experience. As such, the school’s goal for the 2017-18 academic year was to expand the accessibility of professional development workshops and special events to include students who are otherwise unable to participate in person, such as those attending through Ecampus, OSU-Cascades or the Hatfield Marine Science Center. The goal was to increase student success offerings to 40 percent over a three-year period through webinars and recorded sessions. That goal was exceeded in the first year, with 60 percent of student success offerings made available to reach these audiences. As a result, 2,035 students participated in orientation activities, workshops and other professional development events throughout the year.

Additionally, in response to previous campus-wide assessments of graduate students’ writing needs, the Graduate School developed a more focused writing support system by continuing its partnership with the Graduate Writing Center (GWC) and establishing a new one with the School of Writing, Literature and Film (SWLF). In winter 2018, the GWC experienced increasing demand for its services with an overall utilization rate of 75 percent, as well as an increase in student users focusing on research and professional writing tasks (as opposed to coursework). Through the Graduate School’s partnership with the SWLF, new experimental courses were offered that support graduate writing for English language learners, thesis completion and STEM and technical reports.
CORE THEME 3 – OUTREACH AND ENGAGEMENT

The third core theme is outreach and engagement, which is central to Oregon State University’s mission as a land grant institution. All academic colleges and many other units contribute to the university’s outreach and engagement mission. A university-wide Outreach and Engagement Council helps set priorities and coordinate initiatives. Additionally, more than 40 community-based learning hubs provide gateways to OSU while connecting the work of the university to local partnerships and issues. Pursuit of the goals articulated in OSU’s strategic plans is enhanced by engagement with citizen learners throughout their lives to improve the vitality of communities and the quality of life for Oregonians. Based on a 150-year-old tradition, OSU’s outreach and engagement effort is guided by the principle of enhancing access to enrichment and problem-solving through reciprocal relationships. The aim is to exchange knowledge and resources in partnership with individuals, communities, businesses, industries, government and educational institutions.

Three core theme objectives delineate OSU’s implementation of outreach and engagement: delivery of programs and degrees to place-bound populations; sustained collaborations and purposeful partnerships; and activities that increase economic development and quality of life. Outreach and engagement uses a portfolio of educational tools and virtual technology to bring the university’s impact to Oregon, the nation and the world.

<table>
<thead>
<tr>
<th>Core Theme 3: Outreach and Engagement</th>
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<tbody>
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<td>Objectives</td>
</tr>
<tr>
<td>3.1: Extend transformative educational experiences to learners, communities and organizations using means beyond traditional classroom-based instruction.</td>
</tr>
<tr>
<td>3.2: Increase collaboration with communities and stakeholders to build and sustain mutually beneficial and reciprocal relationships to advance learning, research and engagement opportunities.</td>
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<table>
<thead>
<tr>
<th>Indicators</th>
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<tbody>
<tr>
<td>3.1.1 Ecampus enrollments and degrees and certificates earned in total and by race/ethnicity, rural status, veteran status, nontraditional age</td>
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<tr>
<td>3.1.2 Noncredit certificates earned</td>
</tr>
<tr>
<td>3.1.3 Participant counts in Professional Development and Continuing Education (PACE) programs</td>
</tr>
<tr>
<td>3.1.4 Counts of collaborative research projects</td>
</tr>
<tr>
<td>3.1.5 Participant counts of youth development programs</td>
</tr>
<tr>
<td>3.2.1 Extension Service program partnerships with participant counts and total volunteer hours</td>
</tr>
<tr>
<td>3.2.2 Amount of external funding secured for outreach and engagement, including NSF, NIH and NIFA</td>
</tr>
<tr>
<td>3.2.3 Scores on the Citizen Evaluation of Teaching (CET)</td>
</tr>
<tr>
<td>3.2.4 Research, scholarship and creative activities/outcomes that provide collaboration with communities and stakeholders</td>
</tr>
</tbody>
</table>
Objective 3.1: Extend transformative educational experiences to learners, communities and organizations using means beyond traditional classroom-based instruction.

This objective reflects the university's commitment to extend the reach of OSU instruction and learning beyond traditional campus-based programs. The indicators within this objective represent a continuum from delivery of traditional degrees and certificates via online and distance education technology (Ecampus), to noncredit instruction and professional development training, youth programs and collaborative research conducted at sites throughout the state or via online technology.

Indicator 3.1.1: Ecampus enrollments and degrees and certificates earned in total and by race/ethnicity, rural status, veteran status, nontraditional age

Ecampus manages OSU’s online credit programs and certificates and reports directly to the Office of the Provost. The Division of University Outreach and Engagement used to house both credit online programs through Ecampus — which had been part of the Extended Campus umbrella — as well as noncredit programs through its Professional and Continuing Education (PACE) unit. In fall 2018, the administrative division Extended Campus was rebranded as Ecampus; noncredit programs through PACE remained with the Division of University Outreach and Engagement. This reorganization reflects that Ecampus is now an integral part of general academic instruction, even for campus-based students. However, Ecampus still contributes to the outreach and engagement mission, even if it is not as a unit of the Division of University Outreach and Engagement.

A goal of outreach and engagement is equitable access to a diversity of populations. This includes serving students who may be more likely to be place-bound, such as older (nontraditional age) students or rural students. Indicators 3.1.1 and 3.1.2 break out this information, although it is not always available because it often relies on student self-reporting.

The Ecampus degrees and certificates earned by students from 2011-12 through 2017-18 is reported in Table 3.1.1A. The number of degrees and certificates issued has more than tripled in the past seven years. Similar steady growth occurred among veterans, rural students and historically underrepresented students. While the state of Oregon is not very diverse, attainment of OSU degrees and certificates by place-bound and historically underrepresented students is a highly successful demonstration of Objective 3.1 fulfillment.
Table 3.1.1A: Ecampus Degrees and Certificates Earned By Race/Ethnicity, Rural Status, Veteran Status, Nontraditional Age

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</thead>
<tbody>
<tr>
<td>American Indian/Alaska Native</td>
<td>9</td>
<td>4</td>
<td>6</td>
<td>7</td>
<td>3</td>
<td>8</td>
<td>8</td>
</tr>
<tr>
<td>Asian</td>
<td>7</td>
<td>13</td>
<td>11</td>
<td>25</td>
<td>43</td>
<td>52</td>
<td>81</td>
</tr>
<tr>
<td>Black/African American</td>
<td>6</td>
<td>6</td>
<td>8</td>
<td>8</td>
<td>12</td>
<td>16</td>
<td>7</td>
</tr>
<tr>
<td>Hispanic</td>
<td>23</td>
<td>17</td>
<td>33</td>
<td>36</td>
<td>52</td>
<td>73</td>
<td>91</td>
</tr>
<tr>
<td>International</td>
<td>5</td>
<td>3</td>
<td>4</td>
<td>10</td>
<td>9</td>
<td>11</td>
<td>42</td>
</tr>
<tr>
<td>Multiple Race</td>
<td>4</td>
<td>14</td>
<td>18</td>
<td>26</td>
<td>33</td>
<td>39</td>
<td>48</td>
</tr>
<tr>
<td>Native Hawaiian/Pacific Islander</td>
<td>4</td>
<td>1</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>0</td>
<td>3</td>
</tr>
<tr>
<td>Unknown Ethnic</td>
<td>40</td>
<td>31</td>
<td>31</td>
<td>27</td>
<td>32</td>
<td>63</td>
<td>53</td>
</tr>
<tr>
<td>White</td>
<td>229</td>
<td>280</td>
<td>382</td>
<td>479</td>
<td>540</td>
<td>740</td>
<td>787</td>
</tr>
<tr>
<td>Address at Entry from Oregon Rural Counties</td>
<td>30</td>
<td>40</td>
<td>50</td>
<td>53</td>
<td>59</td>
<td>53</td>
<td>61</td>
</tr>
<tr>
<td>Veteran (Any Indicator, Including Active Duty)</td>
<td>26</td>
<td>23</td>
<td>29</td>
<td>58</td>
<td>51</td>
<td>77</td>
<td>79</td>
</tr>
<tr>
<td>Age at Entry: 25 Years or Older</td>
<td>257</td>
<td>287</td>
<td>386</td>
<td>483</td>
<td>538</td>
<td>742</td>
<td>770</td>
</tr>
<tr>
<td>Total – Ecampus Degrees/Certificates</td>
<td>327</td>
<td>369</td>
<td>495</td>
<td>620</td>
<td>726</td>
<td>1,002</td>
<td>1,120</td>
</tr>
</tbody>
</table>

Table 3.1.1B: Ecampus Fall Enrollments

| Indicator 3.1.2: Noncredit certificates earned |
|-----------------------------------------------|-----------------------------------|
| Indicators 3.1.2 and 3.1.3 address the professional or instructional needs that do not require a credit-based degree program. Instead, they deliver skills or training that allow individuals to advance in their careers or improve their personal circumstances. |
| There is strong growth in the awarding of noncredit Professional Development and Continuing Education (PACE) certificates, as demonstrated in Table 3.1.2. There are, however, limitations in data collection systems. While the intent is to review data by the types of certificates issued and by learner demographics, currently only aggregate PACE awards can be reported. Building OSU’s data collection capacity for noncredit students is a priority goal for the coming years. |
Table 3.1.2: Type of Noncredit Certificate

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<tbody>
<tr>
<td>Noncredit Certificates Awarded by PACE</td>
<td>187</td>
<td>379</td>
<td>477</td>
<td>1,686</td>
<td>2,017</td>
<td>2,386</td>
</tr>
</tbody>
</table>

**Indicator 3.1.3: Participant counts in Professional Development and Continuing Education (PACE) programs**

Professional and Continuing Education (PACE) delivers more than 200 professional online courses and certificate programs to learners. Serving an excess of 10,000 learners annually since 2014, PACE focuses on empowering individual learners and organizations with flexible, innovative professional development experiences in a wide variety of subjects ranging from leadership and human resources to web development. Participation rates in PACE, shown in Table 3.1.3, reflect strong growth in access to professional development training and continuing education offerings.

Table 3.1.3: Participant Counts in Professional Development and Continuing Education (PACE) Programs

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<tr>
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<tbody>
<tr>
<td>Duplicated Enrollment in PACE Programs</td>
<td>45</td>
<td>1,997</td>
<td>3,126</td>
<td>10,179</td>
<td>12,437</td>
<td>12,317</td>
<td>11,050</td>
</tr>
</tbody>
</table>

**Indicator 3.1.4: Counts of collaborative research projects**

OSU is dedicated to providing transformational experiences for researchers, Extension Service agents, faculty members and the populations that they serve. This involves extending research results to local contexts and developing knowledge from collaborative work in communities.

The data in Table 3.1.4 shows a steady rise in a specific category of collaborative research projects. It is an undercount of all types of collaborative research, as data systems that show the full range of such collaborative research are currently unavailable. However, even within these counts, the numbers belie the larger numbers of university and community participants engaged in mutually beneficial research.

Table 3.1.4: Counts of Collaborative Research Projects

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<tbody>
<tr>
<td>Number of Active Collaborative Research Projects (Type 1)¹</td>
<td>18</td>
<td>23</td>
<td>26</td>
<td>21</td>
<td>23</td>
<td>26</td>
<td>33</td>
</tr>
</tbody>
</table>

¹The number of College of Agricultural Sciences projects that were initiated include OSU Extension Service components.

**Indicator 3.1.5: Participant counts of youth development programs**

This objective measures an added dimension of involving and serving Oregon via youth development programs. Oregon youth and OSU students participate through multiple programs, including on-campus programs, 4-H and Outdoor School. Excepting Outdoor School, the number of youth reached is somewhat steady with increasing OSU student participation.

The participation counts in Table 3.1.5 suggest the broad reach that OSU’s outreach and engagement and youth development programs have on the young people of Oregon and their families. While not generally
known, programs such as 4-H are powered by land grant universities. The number of OSU students involved in these development programs is also impressive, as they receive practical experience while contributing to the development of K-12 students.

Table 3.1.5: Participant Counts of Youth Development Programs

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<tr>
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</thead>
<tbody>
<tr>
<td>Number of K-12 Student Participants¹</td>
<td>93,522</td>
<td>98,750</td>
<td>97,061</td>
<td>76,425</td>
<td>97,929</td>
<td>97,561</td>
<td>90,053</td>
</tr>
<tr>
<td>Number of OSU Students Involved in Programs/Events</td>
<td>899</td>
<td>1,345</td>
<td>1,750</td>
<td>1,757</td>
<td>1,824</td>
<td>2,161</td>
<td>N/A</td>
</tr>
</tbody>
</table>

¹Duplication is possible. For example, one student can participate in five programs and be counted five times. Includes precollege programs and 4-H enrollments. Does not include other Extension programs, except where noted.

²Includes Outdoor School participation by fifth and sixth graders.
³Includes partial data for precollege programs (2017-18 data are still being collected).

Summary of Objective 3.1
Oregon State University has a long-standing history of fulfilling its mission of extending education experiences beyond classroom-based instruction. The newer focus of this objective was partly based on insights gleaned from the Division of University Outreach and Engagement’s 2016-2021 Strategic Plan and ongoing conversations with faculty and staff within the division. Additionally, unparalleled growth and national recognition of OSU’s Ecampus programs strongly emphasizes fulfillment of Objective 3.1. Oregon State University strongly fulfills this mission element related to extending transformative educational experiences to learners, communities and organizations using means beyond traditional classroom-based instruction.

Objective 3.2: Increase collaboration with communities and stakeholders to build and sustain mutually beneficial and reciprocal relationships to advance learning, research and engagement opportunities.

Community engagement and collaborations broaden the impact of OSU’s learning and research core themes. This objective represents the unique aspect of the land grant university — the expansion of learning and the development of knowledge beyond traditional structures of classroom credit instruction and laboratory/library research. The indicators in this section focus on three broad aspects of Objective 3.2: participation rates in all types of Extension Service programs (Indicator 3.2.1); participant perception of the program effectiveness (3.2.3); counts and examples of research, scholarship and creative activities that provide collaboration with communities and stakeholders (3.2.4); and external research and scholarly activity via funding (3.2.2) Most of the programs are coordinated under the auspices of the Extension Service, which has centers in all 36 Oregon counties. This section does not capture related activities outside of the Extension Service.

Indicator 3.2.1: Extension Service program partnerships with participant counts and total volunteer hours
Nearly 500 Extension faculty and staff, located in all 36 counties in the state, unlock the potential of learners — from youth to seniors — to learn, grow and thrive through many of Extension’s program areas.
Reflecting the OSU mission, OSU Extension also supports resilient and productive ecosystems for vibrant communities and a sustainable economic future. OSU’s work supports agriculture, community food systems and home horticulture while building thriving, equitable and healthy communities.

OSU Extension records more than 2 million face-to-face educational contacts with Oregonians each year at offices throughout the state. While relatively constant over time, this number does not capture the increasing use of virtual and media contacts. One example is the online Ask an Expert widget that responded to 8,000 inquiries in 2018, of which more than 50 percent were new to OSU services.

Figure 3.2.1

Participant counts and volunteer hours are shown in Table 3.2.1A. The number of direct contacts in Extension programs is tricky to interpret because the counts are dependent on the number and types of programs offered, as well as the types of systems used to accurately gather participant data. Additionally, the convening function is a particular type of collaboration whereby OSU may provide capacity to communities and stakeholders without necessarily being a direct stakeholder. Volunteers help deliver programs through master credentials — gardening, food preservation, woodland management, naturalists and beekeeping — in addition to supporting 4-H youth, Juntos students and their families, and other program areas. Volunteers are essential to delivering more services and programs to communities. The number of volunteers involved in programs has roughly doubled since 2011, reflecting new programs and increasing emphasis on formalizing volunteer relationships. Finally, not all convened meetings need a formal agreement or document. However, completion of a Memoranda of Understanding (MOU) or Memoranda of Agreement (MOA) represents measurable outcomes for the Division of Outreach and Engagement. The data in Table 3.2.1B shows OSU’s continued growth in such outcomes over the past seven years.
Table 3.2.1A: Extension Service Program Partnerships with Participant Counts and Total Volunteer Hours

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</thead>
<tbody>
<tr>
<td>Number of Reported Direct Contacts</td>
<td>815,294</td>
<td>944,867</td>
<td>773,041</td>
<td>763,933</td>
<td>457,758</td>
<td>340,750</td>
<td>244,928</td>
</tr>
<tr>
<td>Total Number of Trained Volunteers¹</td>
<td>6,410</td>
<td>8,171</td>
<td>7,082</td>
<td>7,423</td>
<td>14,582</td>
<td>13,127</td>
<td>14,754</td>
</tr>
</tbody>
</table>

¹Volunteer data recorded in Digital Measures

Table 3.2.1B: Number of Memoranda of Understanding (MOU) and Memoranda of Agreement (MOA)

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</thead>
<tbody>
<tr>
<td>Total MOUs/MOAs Completed</td>
<td>251</td>
<td>288</td>
<td>431</td>
<td>402</td>
<td>397</td>
<td>472</td>
<td>684</td>
</tr>
</tbody>
</table>

Indicator 3.2.2: Amount of external funding secured for outreach and engagement, including NSF, NIH and NIFA

A key to continuous improvement and effective collaborations is securing extramural funding to support outreach and engagement activities, especially in light of reductions in state support. Growth in sponsored program funding for outreach and engagement activities over the past seven years is demonstrated in Table 3.2.2. Applied research and educational partnerships are made possible by external funding provided by agencies and organizations, including the National Science Foundation, the National Institutes of Health, the USDA-National Institute of Food and Agriculture and others. Award amounts have been increasing since 2011-12.

Table 3.2.2: Amount of External Funding Secured for Outreach and Engagement, including NSF, NIH and NIFA

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</thead>
<tbody>
<tr>
<td>Total External Funding Awarded for Outreach and engagement¹</td>
<td>$10,687,497</td>
<td>$18,423,686</td>
<td>$19,365,829</td>
<td>$22,057,715</td>
<td>$22,962,605</td>
<td>$20,162,475</td>
<td>$23,503,979</td>
</tr>
</tbody>
</table>

¹Includes grants awarded and county appropriations received.

Indicator 3.2.3: Scores on the Citizen Evaluation of Teaching (CET)

Participants in Extension programs consistently rate program effectiveness very highly, as demonstrated in Table 3.2.3. The average score is about 5.5 on a scale of 1 to 6 (where 6 is excellent) on the Citizen Evaluation of Teaching (CET). While any evaluation tool has limitations, these outcomes provide high confidence that the Extension Service’s continuous collection of program data, ongoing analysis and evaluation, and use for program improvements are yielding effective programs.
Table 3.2.3: Scores on the Citizen Evaluation of Teaching (CET)

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</thead>
<tbody>
<tr>
<td>Average CET Score</td>
<td>5.47</td>
<td>5.50</td>
<td>5.43</td>
<td>5.48</td>
<td>5.50</td>
<td>5.54</td>
<td>5.54</td>
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<tr>
<td>from All Sessions</td>
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<td>Academic Year1</td>
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<td>(Quality of</td>
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<td>Educational Event)</td>
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<tr>
<td></td>
<td>5.45</td>
<td>5.49</td>
<td>5.41</td>
<td>5.47</td>
<td>5.47</td>
<td>5.52</td>
<td>5.53</td>
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<tr>
<td>Average CET Score</td>
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16-point scale from poor (1) to excellent (6).

Indicator 3.2.4: Research, scholarship and creative activities/outcomes that provide collaboration with communities and stakeholders

While continuous collaboration is valuable without necessarily resulting in a quantifiable outcome, the counts of peer-reviewed articles and other scholarly products are shown in Table 3.2.4. These data provide clear evidence that collaborations are yielding documented results. In particular, the second category measures useful products such as non-journal articles, guides, papers, assessments and reviews that demonstrate value beyond the traditional research outcome of peer-reviewed journal articles.

Table 3.2.4: Research, Scholarship and Creative Activities/Outcomes that Provide Collaboration with Communities and Stakeholders

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<tbody>
<tr>
<td>Total Peer-Reviewed</td>
<td>1,100</td>
<td>988</td>
<td>1,038</td>
<td>1,483</td>
<td>1,313</td>
<td>1,940</td>
<td>1,732</td>
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<tr>
<td>Research Articles</td>
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<td>peer-reviewed</td>
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<td>publications)</td>
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<tr>
<td>Total Scholarly</td>
<td>1,049</td>
<td>1,008</td>
<td>1,003</td>
<td>1,345</td>
<td>1,050</td>
<td>1,508</td>
<td>1,564</td>
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<tr>
<td>Reports/Websites/Guides</td>
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<td>reports/websites/guides)</td>
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</table>

The following are several examples of research, scholarship and creative activities that provide collaboration with communities:

- The Hatfield Marine Sciences Center (HMSC) partners with the Lincoln County Community Services Consortium, MidCoast Watersheds Council and OSU Extension 4-H to support at-risk youth as part of a natural resource conservation crew. Working with OSU faculty, the students worked on mud shrimp biology and learned about estuarine ecology and laboratory procedures. Youth gained job skills while learning about the ecology and wildlife of the local environment. The Lincoln County Community Services Consortium serves youth in Linn, Benton and Lincoln counties, and the youth conservation crew is one of its most popular programs.

- Oregon has one of the most prevailing child hunger and food insecurity rates in the nation. To combat this problem, OSU Extension nutrition educators helped found the Childhood Hunger Coalition, an Oregon Food Bank program that informs health practitioners how to recognize signs of hunger and practice effective intervention strategies that provide relief for at-risk children and families. OSU
Extension nutrition educator Anne Hoisington has trained hundreds of health care workers and several partner health care agencies and organizations, in part through a free, five-unit online course. Since its availability in October 2008, approximately 2,500 nurses, physicians, dieticians and other health care workers have completed the course, and around 66 percent of those who took follow-up surveys indicated they made changes in their patient care processes as a result.

- The international green-building products sector is highly competitive. To help related Oregon companies remain successful, the Forest Research Laboratory (FRL) commissions scientists to create improved forms of state-of-the-art engineered composite materials. This process entails characterizing, developing and testing sustainable materials for a diverse range of applications, including buildings and transportation infrastructure. In 2014, for the fifth annual Sustainable Structures Symposium, FRL researchers and the College of Forestry partnered with Portland State University’s School of Architecture and Ecotrust, a Portland nonprofit. This brought together architecture, engineering and green-building experts to discuss potential innovative and sustainable building strategies and how to educate future architects and engineers. OSU research continues to use advances in new green wood composites and adhesives, as well as other products that are more environmentally friendly and have led to reduced costs and improved performance.

- Oregon vegetable seed producers depend on honey bees for the maintenance of their industry, yet the carrots, onions and parsley they harvest do not naturally emit a sufficient quantity or quality of nectar to attract the pollinators. In response, scientists at the Central Oregon Agricultural Research and Extension Center in Madras introduced artificial larval pheromones to bee hives, causing bees to sense a large brood of larvae in need of feeding. This prompted the hive to forage more thoroughly for pollen and nectar, increasing their visitations to vegetable seed crops. As a result, OSU found an overall increase in pollination as well as a 15 percent boost in carrot seed crop yields.

**Summary of Objective 3.2**

Oregon State University strongly fulfills increasing collaboration with communities and stakeholders to build and sustain mutually beneficial and reciprocal relationships to advance learning, research and engagement opportunities.

**Objective 3.3: Increase the impact of outreach and engagement activities, economic development and quality of life throughout Oregon and beyond.**

Objective 3.3 represents a macro version of the collaboration efforts described in Objective 3.2 above and shows the impact of OSU’s outreach and engagement activities, economic development and quality of life throughout Oregon and beyond. This includes the impact of corporate, national and global research efforts. Indicator 3.3.1 measures OSU’s global economic and societal impact. Examples of the impact of the university’s statewide public services programs are provided in Indicator 3.3.2. The university also engages in education, research and outreach activities across the state, nation and around the world. Indicator 3.3.3 provides the number of global partnerships and agreements OSU enters into each year. Another measure of OSU’s impact and reach throughout Oregon and beyond is reported in Indicator 3.3.4, which measure the number of students who participate in study abroad programs and other international experiences offered through the Office of Global Opportunities (OSU GO). OSU’s research and outreach activities have also helped incentivize startup businesses, as shown by the examples listed in Indicator 3.3.5. Finally, Indicator 3.3.6 highlights examples of OSU’s use of outreach and engagement in the academic curriculum.
Indicator 3.3.1: Measures of OSU's economic development and societal impacts

The data for Objective 3.3.1 provides computed estimates of the total economic impact that OSU activities have on the state of Oregon. This includes measures of direct impacts as well as indirect and induced impacts that go beyond simple measures of annual expenditures. Table 3.3.1 shows that OSU’s statewide economic impact has grown steadily since 2011.

Table 3.3.1: Statewide Economic Impact

<table>
<thead>
<tr>
<th>Indicator</th>
<th>2011</th>
<th>2015</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Statewide Economic Impact</td>
<td>$1.932 billion</td>
<td>$2.232 billion</td>
<td>$2.334 billion</td>
</tr>
<tr>
<td>Direct Impact</td>
<td>$842.7 million</td>
<td>$973 million</td>
<td>$989 million</td>
</tr>
<tr>
<td>Indirect Impact</td>
<td>$334.2 million</td>
<td>$424.2 million</td>
<td>$155 million</td>
</tr>
<tr>
<td>Induced Impact</td>
<td>$755.6 million</td>
<td>$834.8 million</td>
<td>$1.19 billion</td>
</tr>
</tbody>
</table>

Source: ECO Northwest analysis

Indicator 3.3.2: Examples of the impact of OSU’s statewide public services programs

This indicator provides narrative examples of impacts from specific statewide public services programs. The following are several examples:

OSU Extension Service

The OSU Extension Service collects, deciphers and tailors research-based knowledge on critical issues to create practical local programs that support health, nutrition, forest and natural resources management, family and 4-H youth programs, agriculture and community development. Faculty collaborate with a diverse range of foresters, growers, businesspeople, individuals and community leaders to investigate the needs of Oregon’s business sectors and communities. They then analyze the gathered information in collaboration with scientists in the Agricultural Experiment Station and Forest Research Laboratory, where emerging knowledge and solutions are developed. This knowledge is then disseminated to the community through OSU Extension’s outreach and engagement programs.

OSU Educates Growers About Invasive, Fruit-Damaging Fly

With the aid of a $5.7 million grant from the National Institute of Food and Agriculture, OSU researchers and Extension specialists developed strategies for recognizing and monitoring the spotted wing drosophila fly, an insect whose larvae feed on ripening fruit, rendering it a threat to Oregon’s berry and cherry industries (Oregon ranks first nationally in the production of black raspberries and third in the production of sweet cherries and blueberries). They have also educated growers, processors and distributors about the fly and have produced several publications on how to protect susceptible fruit and identify pest-related damage. In addition, they continually update online information that instructs growers on assessing the risk of infestation and potential crop loss.

Oregon Agricultural Experiment Station

The Oregon Agricultural Experiment Station (OAES) is Oregon’s leading source of current and emerging knowledge relating to agricultural and food systems, quality of life, environmental quality and economic development in rural and urban communities. OSU scientists work at 11 OAES branch facilities throughout the state in collaboration with the agriculture/food industry, natural resource and other entities at local and statewide levels. The knowledge developed by OAES research is taught to students
both in a conventional classroom setting as well as in the field and is shared with research colleagues and stakeholders through a variety of means, including print and online publishing. This knowledge is also imparted to the community through OSU Extension outreach and engagement programs.

**OSU Fortifies Dairy, Poultry Foods by Changing Animals' Diets**

OAES researchers discovered that when cows were fed six pounds of flaxseed daily, saturated fatty acids in whole milk decreased 18 percent, polyunsaturated fatty acids increased 82 percent and levels of omega-3 fatty acids, which can improve heart health, rose 70 percent. In light of this information, OSU has added flaxseed to chicken and cow feed to produce more wholesome poultry meat and dairy products. The university has also generated evidence that flaxseed can be grown in Oregon as a rotation crop, with yields of 15 to 20 bushels per acre.

**Forest Research Laboratory**

The Forest Research Laboratory (FRL) conducts cutting-edge research on forest ecosystems and management that leads to renewable forest yields, innovative and efficient use of forest products and improved stewardship of Oregon's forest resources. Scientists work in laboratories, manufacturing facilities and public and private forests throughout the state and around the world using information gathered and provided by multiple statewide cooperators. Under the direction of the Institute for Working Forest Landscapes (IWFL), launched by the College of Forestry in November 2013, FRL research programs are focused on managing landscapes that will enhance people's lives and advance the overall health of the state's lands, businesses and vital ecosystems.

**OSU Keeps Forests Healthy and Productive**

The growth rates and competitiveness of Douglas fir, the most valuable timber species in the Pacific Northwest, faces threats of significant reduction. This is due to its susceptibility to Swiss needle cast, a native fungal foliage disease that causes the tree to prematurely shed its needles, leading to scant crowns and diminished diameter and height growth. OSU created the Swiss Needle Cast Cooperative to research and manage the disease, and the OSU Extension Service published a guide for forest managers that explains what Swiss needle cast is and how it can be identified. In addition, the Forest Research Laboratory developed an integrated pest management strategy to enhance timber productivity and forest health, which continues to be used by businesses, landowners and forest managers.

**Indicator 3.3.3: Number of global partnerships and agreements**

Supporting items in this category are reviewed annually and provide the number of global partnerships and agreements. The growth in the number of global partnerships and agreements over the past seven years is shown in Table 3.3.3, beginning with one partnership in 2011-12 to 146 partnerships in 2017-18.

**Table 3.3.3: Number of Global Partnerships and Agreements**

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<tbody>
<tr>
<td></td>
<td>1</td>
<td>3</td>
<td>22</td>
<td>47</td>
<td>67</td>
<td>93</td>
<td>146</td>
</tr>
</tbody>
</table>

**Indicator 3.3.4: Number of students participating in study abroad programs and other international experiences**

This indicator reveals the mutual benefits of outreach and engagement efforts on OSU's traditional degree-seeking student population. Indicator 3.3.4 provides counts of OSU students participating in...
education abroad through the Office of Global Opportunities (OSU GO). As a land grant institution with ample enrollments by students from Oregon, OSU GO’s work to send increasing numbers of OSU students abroad for study, internship and research experiences is critical to the university’s mission to produce graduates who possess the intercultural skills and competencies needed to be competitive in the global economy and supportive of economic and social progress for people around the world. By administering high-quality international opportunities that are accessible, affordable and academic in nature, OSU GO provides a transformative educational experience for all learners that increases students’ awareness of their unique positions in a global society, enhances their ability to engage across human differences and equips them with the skills needed to serve Oregon, the nation and the world. Table 3.3.4 demonstrates that the number of students taking part in OSU GO programs has increased steadily over the past seven years.

Table 3.3.4: Number of Students Participating in Study Abroad Programs and Other International Experiences

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<tbody>
<tr>
<td>Total Students Participating in OSU GO Study Abroad Programs</td>
<td>466</td>
<td>504</td>
<td>508</td>
<td>497</td>
<td>508</td>
<td>562</td>
<td>660</td>
</tr>
</tbody>
</table>

Indicator 3.3.5: Examples of startup businesses from OSU research and outreach

This indicator provides information regarding the impacts of OSU’s research and outreach efforts; these efforts have helped incentivize startup businesses.

Invention disclosures, a significant contributor to new startup businesses, have increased over the last seven years from a low of 59 per year to a current total of 78 in 2017-18. As of December 2018, 33 inventions have been reported.

The following are examples of startup businesses or programs that support their development:

- The Oregon State University Advantage connects business with faculty expertise, student talent and world-class facilities to research solutions, bring ideas to market and launch companies. Internally the OSU Advantage provides resources, programs, capital and a professional team to support innovation and entrepreneurship by faculty and students in creating high-growth startups, protect and license intellectual property and efficiently negotiate a range of agreements with industry to maximize OSU’s societal impact.

- OSU is an NSF Innovation Corps (I-Corps) site, nurturing students and faculty involved in projects with commercialization potential. The I-Corp program is designed to accelerate commercialization of new technologies, products and processes that emerge from universities. In 2015, OSU received a three-year grant from the National Science Foundation, becoming one of only 36 I-Corps sites nationwide.

- Pharmaceutical Sciences faculty co-founded three startup companies developed around research from their laboratories: Gadusol Laboratories, Lipidomics Inc. and Celnex LLC. Gadusol Laboratories, an Oregon BEST company and a National Science Foundation Small Business Innovation Research (SBIR) grantee, was co-founded by College of Pharmacy professor Taifo Mahmud and Alan Bakalinsky from the Department of Food Science in the College of Agricultural Sciences. The company applies proprietary synthetic biology methodology to produce natural sunscreen compounds that are
sustainably sourced and environmentally safe. Lipidomics Inc., co-founded by Professors Arup and Gitali Indra and funded by the Oregon Nanoscience and Microtechnologies Institute (ONAMI), develops cosmetics and pharmaceutical products that help prevent inflammatory skin conditions such as eczema by replenishing lipids that are deficient in the skin. Finally, Celnex LLC is developing a family of proprietary compounds that serve as targeted anti-cancer therapies to treat Ewing’s sarcoma, a common form of bone cancer in children. Celnex was co-founded by College of Pharmacy professor Mark Leid and Monika Davare from the Department of Pediatrics at Oregon Health & Science University (OHSU). The company is supported by venture development funds from OSU and the Biomedical Innovation Program at OHSU.

The College of Pharmacy remains one of the most active colleges at OSU in submitting invention disclosures and protecting intellectual property. Faculty filed 11 patent applications in 2018 and signed new licensing agreements on two existing patents.

Indicator 3.3.6: Examples of the use of outreach and engagement in the academic curriculum

This indicator provides narrative examples of how outreach and engagement program results are used in the traditional academic classroom to enhance the curriculum.

- **Helping Seniors Cope with Aging Issues:** To help seniors manage chronic problems and live healthier, OSU Extension used a $300,000 USDA grant to create an online course, *Mastery of Aging Well*. The content is broken down into five units that address memory difficulties, depression, medications, food and physical activity. The course is offered as a series of five free, self-paced modules online through Professional and Continuing Education (PACE). The course is co-sponsored by Oregon AARP.

- **Growing Healthy Communities:** *Generating Rural Options for Weight (GROW) Healthy Kids and Communities* was a five-year, $4.9 million USDA NIFA-funded project that integrated research and the OSU Extension Service to prevent a rise in obesity prevalence among rural children. The multi-state, community, school and family home project used participatory and population approaches to create a rural context and culture acknowledging the importance of weight health. The website provides information to the public about the project and rural childhood obesity prevention, including family newsletters, media articles, tools and links to partners and public resources.

- **College of Forestry:** The H.J. Andrews Experimental Forest and Long-Term Ecological Research Program celebrated its 70th anniversary in 2018. The program supports research on forests, streams and watersheds and connects more than 160 researchers and students across multiple disciplines including ecology, hydrology, information management, social science, system modeling, art and humanities, history and philosophy. The [Andrews Forest program](https://www.osu.edu/andrewsforest) is a partnership between three organizations: The College of Forestry, the U.S. Forest Service Pacific Northwest Research Station and the Willamette National Forest. Last year, the program hosted more than 1,600 people participating in classes, tours and conferences. More than 600 undergraduate and graduate students from across Oregon used the Andrews Forest field station for research and coursework. In K-12 outreach, the program hosted more than 300 students in experiential learning experiences in the forest, and more than 40 K-12 educators participated in workshops and trainings.

- **Honors College:** One of the hallmarks of honors education is experiential learning opportunities, many of which involve engaging with local and global communities. To support faculty in developing new experiential learning opportunities for honors courses, the Honors College established the Margaret E. and Thomas R. Meehan Course Development Grants. Opportunities funded by this grant have included a trip to the Museum of Popular Culture in Seattle to learn about the history of
rock and roll, social justice-focused walking tours of Portland neighborhoods, 3D printing and wind tunnel testing of engineering designs, materials to customize ride-on cars for children with disabilities, and a nine-day field experience learning about Oregon geology at sites around the state. To make sure that experiential learning opportunities are accessible to all students, the Honors College offers the Experience Scholarship on a rolling basis throughout the year. Students can use these funds for course-related experiences, study abroad, research or conference travel or other learning opportunities.

- **OSU-Cascades**: The Bend campus has recently redesigned its elementary and secondary mathematics methods courses to mitigate the theory-practice gap experienced by students and often referenced in teacher education literature. Rather than completing theory coursework followed by a student teaching experience, OSU students meet with local K-12 students in their classrooms. An advantage of situating math methods courses within the realities of public-school classrooms is that university instructors and practicing math teachers have opportunities to work collaboratively to leverage what the teacher candidates are learning in theory and what they are experiencing in the field. These field-based methods classes include activities such as observing, interacting with students during small group work and teaching instructional activities to students. This field-based methods course supports teacher candidates to develop pedagogical content knowledge while also learning how to put that knowledge into practice in authentic school settings with actual students.

- **Tourism, Recreation and Adventure Leadership (TRAL)**: The OSU-Cascades program has a long-term partnership with the United World College of Southeast Asia (UWCSEA) in Singapore that involves research, internship opportunities for TRAL students and a teacher exchange. The UWCSEA is one of the largest K-12 international schools in the world with approximately 5,000 students on two campuses. TRAL program faculty are leading a seven-year international and collaborative research study that will add to the global knowledge of how outdoor education impacts K-12 student learning. The partnership also allows for OSU-Cascades undergraduate students to participate in an internship in Singapore and for UWCSEA outdoor education instructors to assist in teaching TRAL expedition courses.

### Summary of Objective 3.3
The total economic impact of OSU activities across Oregon is very large and well beyond appropriations and student aid provided by the state of Oregon. The breadth and amount of statewide programs and the impact of these efforts on academic programs are quite substantial. The main effort for the future is to continue to seek funding to expand these programs. The number of global partnerships has grown significantly, and types of startups show a solid contribution to pushing the limits of innovation. Even so, this is an area where even more can be expected, given the range and quality of OSU’s technology, science and health research.

While there has been growth in the number of students participating in study abroad programs, the number is small compared to OSU’s recent 32,000 record enrollment. And while the majority of OSU students are in STEM majors, which make scheduling international education more difficult, incorporating OSU’s global impact into the experiences of its degree-seeking students is an important goal. The university is reviewing policies and mechanisms to enable more students to participate in such high-impact practices without taking on greater financial burden.

Oregon State University fulfills this mission element and will continue to build on its foundation of global partnerships to increase student participation in international opportunities.
CORE THEME 3: IMPROVEMENTS

Deepening Global Ties

OSU GO: The Office of Global Opportunities (OSU GO) supports international travel and related cultural, academic and scholarly experiences by members of the OSU community. As a central administrative unit of the university, OSU GO is charged with supporting the safety of all OSU travelers abroad, providing faculty with tools and resources to add international dimensions to their work on campus, and incentivizing students to gain international experiences during the completion of their degree. Research on the outcomes of students who complete international experiences finds that first- and second-year retention rates for students who study abroad are higher than students who do not; students who study abroad are more likely to complete their degrees than students who do not; students who return from their time abroad gain an increased sense of confidence in their academic and career pursuits and a passion for better understanding social, cultural and economic systems around the world; and a growing number of employers value and seek out cross-cultural understanding and skills in an increasingly global economic environment.

International Affairs: One charge of International Affairs is to support OSU academic and research faculty, as well as staff engaged in education abroad, in entering into agreements with international partners. These agreements underlie programs providing educational experiences for OSU students, as well as relationships resulting in scholarship and research with statewide, national and international impact. Entering into agreements with international partners involves exacting processes. Because OSU must be able to measure and report on its activities whenever they occur, it is required to produce all information concerning international activities, such as which colleges and departments are developing international programs and how much research, teaching and learning is taking place beyond the U.S. Historically, this information was spread among staff in several units, stored in emails and personal spreadsheets, and often led to agreements that were stalled or misplaced. Because there was not a single data store, it was difficult — and resource-intensive — to create reports that summarized activities. International Affairs continually works to refine these processes in ways that minimize the administrative burden for all parties reporting on international activities, allowing them to focus on educational and research goals.

To provide insight into the university’s international relationships and programs, International Affairs created a repository for tracking the supporting agreements as they are developed and after they are executed. The repository contains letters of collaboration and memorandum of understanding, study abroad programs, internships and exchange programs. It was developed in Salesforce, as the platform offers the potential to directly associate the university’s data with other operational data. This facilitates connecting agreements to faculty and staff involved, as well as generating reports. When an agreement is nearing the end of its term, the International Affairs agreement coordinator receives a notification and proactively works with the parties involved to begin the renewal process. Additionally, DocuSign has been integrated into the repository, as collecting legally binding signatures electronically is much more efficient than mailing paper copies or sending email attachments, and staff are able to see exactly where in the signature process the document sits at any time.

Expanding the Quality, Diversity and Services of Educational Opportunities

Open Campus works with students in the Degree Partnership Programs (DPP) across the state to help increase degree completion with OSU. In 2017-18, Open Campus coordinators served over 150 students at eight community colleges. In Oregon, 80 percent of students entering community college indicate they
are planning to pursue a bachelor’s degree. However, only 11 percent ultimately graduate from a four-year institution. Open Campus is piloting a transfer program — Gateway — that seeks to close that gap.

The Gateway program, along with other efforts and initiatives by the university to increase transfer student success, will enhance support programs to help them navigate OSU’s physical and cultural environment. Programming includes facilitating students’ integration into new peer networks and communities of support; connecting students with undergraduate research and other experiential learning opportunities; and understanding the unique academic and financial needs to ensure success at OSU. See Transition Support within the Cross Campus Strategic Initiatives for more details.

Open Campus' work with the Juntos program continues to grow and expand. The new Juntos research team, which supports the educational journeys (including K-12 and higher education) of Oregon-based Latinx students and their families, received funding from the Ford Family Foundation in fall 2018 to increase curricular and evaluation efforts. This has enabled programmatic expansion to new schools in Central, Coastal and Eastern Oregon, ensuring that a greater number of students will be equipped with the knowledge, skills and resources needed for continual academic success and college preparedness. Through Open Campus, the university remains committed to building innovative programs and initiatives for underserved communities that will increase high school graduation, college transfer programs and community development support in various counties across Oregon.

**Ecampus:** OSU's land grant mission and legacy of global excellence are the foundation on which OSU Ecampus was built. Since 2002, Ecampus has provided a growing number of national and international learners — among them working professionals, stay-at-home parents, veterans and military service members — access to a high-quality OSU education. According to 2019 rankings issued by U.S. News & World Report, OSU ranks third in the nation for online bachelor’s degree programs, marking the university’s fifth consecutive year in the nation's top 10 ranking. A total of 373 institutions were evaluated this year, putting OSU in the top one percent in the country for online undergraduate education.

*U.S. News & World Report* also ranked OSU ninth in the nation for Best Online Graduate Engineering Programs, a significant jump from its number 26 ranking in 2018. In fall 2018, 6,565 students were enrolled at OSU exclusively through online degree courses, an increase of 7.9 percent from fall 2017. Ecampus delivers more than 1,200 classes and over 50 undergraduate, graduate and certificate programs to learners in all 50 states and more than 50 countries.

**Strengthening Community Engagement and Impact**

**Carnegie Community Engagement Classification:** The elective Community Engagement classification is under the stewardship of the Swearer Center at Brown University. The designation is the most prestigious recognition a university can receive to demonstrate the significance of its community engagement work and commitment to integrate Oregon’s rich tapestry of communities, peoples and experiences into its mission. Oregon State University first received this important classification in 2010 and has committed to continue building a distinctive community-engaged identity through exceptional institutional practice and quality improvement.

Although a significant portion of the work recognized in the Carnegie Community Engagement designation occurs within the OSU Division of Outreach and Engagement, the designation acknowledges community engagement across the other two aspects of the university mission: teaching and learning and scholarship and research. “The Carnegie designation recognizes the mutually beneficial work we’re involved in and the reciprocity between the university and the communities we serve,” said Vice Provost for University Outreach and Engagement Scott Reed in a 2011 interview after OSU received its
designation. “The opportunities to further enhance that work are rich and extensive, and we will build on this new classification with deeper work that sets an even stronger standard for what is possible when universities and communities collaborate.” As OSU seeks reclassification, it strives to demonstrate the progress made in the last decade to more strongly build reciprocity, mutual benefit and shared knowledge and resources into its community engagement efforts.

**Outdoor recreation economy:** The Division of Outreach and Engagement is leading an initiative to serve a newly classified industry: the Outdoor Recreation Economy. In 2017, the Outdoor Industry Association reported that 69 percent of Oregonians engage in outdoor recreation, generating $16.4 billion in consumer spending and 172,000 jobs overall. Working across several colleges and the OSU Impact Studio, OSU will create the first sector-wide workforce development portal to accelerate this rapidly expanding industry, serving industry, nonprofits and public agencies.

**Outdoor School:** Entering its first year as a fully staffed unit, Outdoor School has a comprehensive statewide implementation plan and research agenda for 2018-19. It includes an analysis of Oregon Department of Education data to predict how many students may be eligible to attend Outdoor School in the next biennium and beyond. Outdoor School has also developed a 2018-19 inclusion plan to support access for all of Oregon’s fifth- and sixth-grade students. Outdoor School was supported with lottery funds by Oregon voters through passage of Ballot Measure 99 in November, 2016.

**Commercializing OSU Innovations**

**Impact Studio:** Created in December 2017, the Impact Studio brings together teams of faculty, staff and students to develop, incubate and launch bold ideas that will advance Oregon State University’s strategic goals, as well as its ability to respond creatively and nimbly to fast-changing trends in higher education. Impact Studio uses proven methodologies to create two to three initiative investment-grade proposals each year, and it provides support for those initiatives in three key areas of development: incubation, pilot and scale-up. Impact Studio engaged over 1,500 faculty, staff, students and partners during its first year, and as a result, OSU currently has one initiative in the incubation phase (Oregon Recreation Economy), one in the pilot phase (Gateway) and one in the scale-up phase (Transfer Student Experience). From September through November 2018, the studio engaged in adjacent opportunity ideation with over 90 stakeholders, producing over 20 adjacent opportunity ideas for the university. Three of these ideas will become initiatives to investigate the rigorous Impact Studio methodology to develop investment grade proposals for selection in August 2019.

The selection criteria for new initiatives are in place to monitor how well an initiative aligns with and contributes to OSU’s institutional growth and mission fulfillment. The criteria are:

1. **External Impact:** Initiative creates a significant and broad impact in society that would not have occurred without Impact Studio support.

2. **Net Revenue:** Greater than $5 million net revenue per year at maturity.

3. **Culture Change:** Provides broad and deep exposure to new methods to drive adjacent growth and new ways of working at OSU and with partners.

4. **Teaching Mission:** Significantly expands OSU’s teaching offering in new and impactful disciplines, modalities or audiences.

5. **Build Capability:** Significantly expands capabilities that can be broadly leveraged for long-term growth and leadership.
6. OSU’s Reputation: Significantly expands the reputation and leadership of OSU at the university level.

7. Internal Collaboration: Significant and new internal collaboration between divisions, colleges and departments.

CORE THEME 3: CHALLENGES

Data collection and tracking of participants: There are limitations in the university’s data collection systems that make the tracking of participants in some programs challenging. While the intent is to collect accurate and complete data, it is not always possible to review data by the types of certificates issued or by learner demographics. As such, OSU can currently only report on aggregate PACE awards. Building OSU’s data collection capacity for noncredit students is a priority goal for the coming years.

Innovation Advancements: The Research Office (RO) has worked on key actions that include:

- Offering programming in partnership with key colleges, including innovation days and brown bags to promote resources and encourage participation.
- Adding a simpler path for faculty to start a conversation about their options before and during their research, rather than submitting a full invention at the end of their research.
- Reassigning a staff member to focus on building engagement across campus and connecting faculty to programs and resources.
- Leading efforts to advance the SP4.0 action to strengthen OSU’s support system for innovation and entrepreneurship. One tactic in this action will be to better incentivize faculty through the promotion and tenure process to participate.

Working across the missions: Engagement partnerships add value to the teaching and research core themes. The statewide distribution of community-based faculty and their local offices provides a front door to OSU for student recruitment. Local offices may also provide experiential learning sites that complement ongoing outreach programs. Through the university’s outreach and engagement efforts, lifetime learning relationships are established, and alumni connections and philanthropy are built.

Because OSU Extension faculty carry academic rank, scholarly output is expected for career advancement. Partnering with researchers in collaborative projects extends the application of intellectual work while introducing community-based problems to the research community. Fully embedding outreach faculty and perspectives into the research enterprise is an ongoing priority.

Metropolitan populations: Oregon’s population is increasingly urbanized, presenting opportunities to grow programs that adapt from a historically rural-focused organization to one that also serves a more urban context. Failure to do so risks political visibility, organizational relevance to contemporary issues, and partnering potential with numerous community-based non-governmental organizations. In the Portland metro area, numerous providers work on issues common to OSU Extension, such as youth development, poverty and urban agriculture. OSU is shifting resources to strengthen capacities of the partnership community. Retaining — and elevating — OSU’s identity through strong marketing and obtaining credit for shared outcomes and impacts are increasingly important. The OSU Portland Center and the Food Innovation Center will provide space and visibility for growing this work in the Portland metro area.
Strengthening ties to economic development: Consistent with the Association of Public and Land Grant Universities’ new Commission on Economic and Community Engagement, outreach faculty and staff are positioned to advance innovation around commercialization and corporate development. Collaboration between OSU’s vice president for research, the vice provost for outreach and engagement and college leadership is critical. The aim is to identify key research findings relevant to local economies and applied research topics that bring researchers and outreach faculty together, as well as strengthen a shared commitment to engagement with developing industries, as illustrated by the outdoor recreation economy initiative.
Oregon State University’s legacy of global excellence is the foundation on which OSU Ecampus was built. Delivering more than 50 degree and certificate programs online since 2002, Ecampus provides access to a high-quality OSU education to a growing number of national and international learners. With an average age of 31, Ecampus students include working professionals, stay-at-home parents, veterans and military service members. The mission of Ecampus is to engage in innovative and creative partnerships with OSU faculty to provide access to exceptional learning experiences that transform the lives of students in Oregon and around the world.

In January 2019, U.S. News & World Report ranked OSU third in the nation for Best Online Bachelor’s Programs and ninth in the nation for Best Online Graduate Engineering Programs.

University policy and Ecampus quality assurance measures support OSU’s commitment to teaching, progress, the continual search for knowledge and solutions and a rigorous focus on academic excellence in online courses and programs. When Ecampus partners with faculty to develop an online section of an OSU course, the course is expected to meet the approved learning outcomes in addition to other quality standards. Faculty are supported to meet these standards through course development funding, full-service instructional design support, multimedia development and required training in developing and facilitating online courses. Collaboration with an instructional designer is a requirement for the development of an Ecampus course and helps to ensure fulfillment of student learning outcomes by encouraging the creation of innovative learning activities to enhance learner engagement. These designers often rely on the support of the Ecampus media development team to create Lightboard videos, interactive videos and 3D animations and simulations, which have been recognized by Eduventures, OLC and WCET.

Ecampus has partnered with colleges to develop a significant portfolio of top-ranked degrees for a global online audience that directly relate to the university’s three signature areas of distinction. Examples include degree programs in sustainable Earth ecosystems such as agricultural sciences, environmental sciences, fisheries and wildlife, geography and geospatial sciences, horticulture and natural resources. Furthermore, a growing number of recently developed online degrees in business and STEM fields are meeting industry and learner demand. Enrollment in OSU’s computer science post-baccalaureate degree has ballooned from 101 students at its launch in summer 2012 to more than 1,500 in fall 2018, making
it the university’s most highly enrolled online program. With students able to earn a degree in as little as one year, the program has produced nearly 1,300 graduates to date, and interviews conducted with students approaching graduation reveal that in-demand computer science jobs present graduates with favorable employment opportunities.

Ecampus also provides leadership in research and scholarship through the work of the Ecampus Research Unit (ECRU). The mission of the ECRU is to significantly advance online education research by contributing new knowledge to the field, responding to and forecasting its needs and challenges, advancing research literacy, fostering strategic collaborations and creating evidence-based resources and tools that contribute to effective online teaching, learning and program administration. ECRU provides support for faculty and instructional designers conducting research through the research fellows program; conducts local and national studies in online and hybrid learning; publishes related papers, articles and books; and conducts conference presentations, publications and the Research in Action podcast. ECRU has been recognized for its leadership by the University Professional and Continuing Education Association (UPCEA).
OSU SPOTLIGHT: JUNTOS/OPEN CAMPUS

Within Open Campus, Juntos (Spanish for “Together”) provides culturally relevant family empowerment activities that emphasize educational pathways. In particular, the program continues to serve the pipeline of Latinx families through K-12 and higher education. With support from more than 33 school districts, five community colleges, all OSU colleges and multiple community partners and stakeholders, of the more than 3,500 family members participating, 100 percent of high schoolers to date have graduated from high school, with 92 percent going on to attend college. Additionally, the first cohort of Juntos students, who were sophomores at Madras High School when the program started, have arrived at OSU, having completed two years at Central Oregon Community College.
CHAPTER 5:
Mission Fulfillment, Adaptation and Sustainability
Eligibility Requirement 24 — Scale and Sustainability:

As part of Oregon State University’s Office of Institutional Analytics and Reporting, the Office of Institutional Research develops and regularly analyzes university strategic indicators and performance measures, maintains data archives, generates data using survey instruments, conducts research on issues of strategic importance and responds to federal, state and other requests for institutional data. OSU applies clearly defined evaluation and planning procedures to every aspect of its operations, then publishes results as applicable, to include assessments regarding the success of its mission and core themes. This information is developed in consultation with and communicated to the Board of Trustees, faculty, staff and the student body.

5.A MISSION FULFILLMENT

5.A.1

The institution engages in regular, systematic, participatory, self-reflective and evidence-based assessment of its accomplishments.

Oregon State University is focused on academic excellence in all aspects of its mission and core themes — undergraduate education, research and graduate education and outreach and engagement. As described in Chapter 3, OSU engages in continuous, focused, methodical, and comprehensive planning guided by institutional values, including a commitment to shared governance, and informed by appropriately defined data. The university’s short- and long-term plans articulate prioritized goals and actions, which guide leadership decisions including resource allocations. Progress has been measured annually since 2003 against a set of university strategic plan metrics. The Office of the Provost issues annual reports on performance and alignment of college efforts with the strategic mission and goals. The president also provides an annual performance report to the Board of Trustees and the Faculty Senate.

Within this broader context of strategic plan metrics, the Office of the Provost conducts ongoing monitoring, assessment and dialogue on strategies and their impact on outcomes. These conversations are broad-based, involving faculty, staff, students and college and division leadership. The overall goal of such evaluations and conversations is to ensure appropriate and timely corrective action and guide the university’s efforts to improve the quality of education, increase collaborations for solving problems and availing of opportunities to make a greater impact.

The NWCCU accreditation standards provided an additional framework for assessment. In 2012, OSU selected three core themes to align with the three dimensions of the university’s mission as well as the three main goals in its strategic plan. The core themes necessitated articulating thresholds for mission fulfillment and defining an expanded set of objectives, indicators of achievement and mission fulfillment yardsticks. The university’s strategic goals have been discussed and refined during university-wide campus forums held over the past three years to develop Vision 2030, SP4.0: Transformation, Excellence and Impact, and the NWCCU year seven self-evaluation report. The Office of Institutional Analytics and Reporting provides information and dashboards to OSU’s planning and prioritization. The Office of University Accreditation, which reports directly to the senior vice provost (Oregon State University’s accreditation liaison officer), provides central coordination for all NWCCU accreditation reporting and mission fulfillment assessments.
In connection with SP4.0, the Board of Trustees approved an expanded set of strategic metrics on January 18, 2019. The strategic metrics are organized into categories: metrics associated with each of the four SP4.0 goals, a set of resource stewardship metrics, and several context metrics. The context metrics help support the interpretation of the other metrics by providing basic information on the characteristics of the university. While the university has a number of metrics and indicators tracked at unit levels, strategic metrics provide overarching, university-wide progress tracking over time.

Certain SP3.0 metrics have continued in SP4.0. The additional metrics are a combination of those reported by the president in his annual assessment to the board; metrics used by the Office of the Provost to track university progress and outcomes, but not included in the president’s assessment or SP3.0; and metrics commonly used by peer institutions, but not previously included in OSU’s official tracking. The goal was to arrive at a uniform set of top-level university strategic metrics that can be produced annually and serve multiple uses. Where appropriate data are available, OSU’s results are benchmarked against public R1 universities (Carnegie classification, very high research activity), OSU’s next-tier peers and top land grant universities. The updated metrics and associated targets are released in July of each year and subsequently reviewed by the Board of Trustees. Selected metrics are used by the board in its annual review of OSU’s president. Feedback from the Board of Trustees is used by senior leadership to assess directions and initiatives for the institution.

In addition, OSU compiles and presents data and reports to Oregon’s Higher Education Coordinating Commission (HECC) on metrics and special topics. Examples include the Oregon Higher Education University Snapshots and Public Higher Education Student Data Reports.

5.A.2

Based on its definition of mission fulfillment, the institution uses assessment results to make determinations of quality, effectiveness and mission fulfillment and communicates its conclusions to appropriate constituencies and the public.

Oregon State University’s mission and core themes were discussed in Chapter 1, and a framework was introduced for assessment of mission fulfillment. A clear definition of mission fulfillment and a set of direct and indirect outcomes (i.e., indicators of achievement and yardsticks) with thresholds defining the extent of mission fulfillment was developed. Where feasible, the institution assessed the yardsticks and indicators of achievement using annual information for the period 2011-18. For some of the indicators and yardsticks, the thresholds are defined in terms of evidence-based evaluations of quality, and acceptable levels of quality are established and assessed. Institutional planning for the core themes was presented in Chapter 3, and the evaluation of the core themes, objectives, and indicators of achievement was presented in Chapter 4.

Reflecting on OSU’s commitments to provide a transformative educational experience for all learners, to be distinctive in its research and scholarship, and to strengthen its engagement and outreach, OSU has identified 50 indicators of achievement and 17 mission fulfillment yardsticks. The yardsticks link directly to core theme objectives and indicators, and they provide assessable measures for articulating the institution’s progress toward mission fulfillment. Yardstick thresholds are based on the range of ratios and percentages of all R1 land grant universities and OSU's internal expectations for continuous improvement. Since OSU is one of 34 R1 land grant universities with similar missions, using this set of universities as comparators is appropriate. Many of the indicators of achievement and mission fulfillment
yardsticks are also among OSU’s strategic university metrics, where the institution sets aspirational targets to become an even stronger and more impactful university among R1 land grants.

Table 5.1 uses gray shading to indicate the university’s determination of fulfillment for each yardstick. Additional details regarding the articulation of thresholds for these mission fulfillment yardsticks — and the linkages between the mission fulfillment yardsticks, OSU’s indicators of achievement and university strategic planning metrics — are discussed for each core theme.

Table 5.1

<table>
<thead>
<tr>
<th>Mission Fulfillment Yardsticks</th>
<th>Core Theme 1: Undergraduate Education</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Mission Fulfillment</td>
</tr>
<tr>
<td>We retain our students</td>
<td>Y1 The first-year retention rate for first-time, full-time degree-seeking students*</td>
</tr>
<tr>
<td>We graduate our students</td>
<td>Y2 The six-year graduation rate for first-time, full-time degree-seeking students*</td>
</tr>
<tr>
<td>Students from all backgrounds succeed</td>
<td>Y3 Gaps in graduation rates for diverse students</td>
</tr>
<tr>
<td>We provide online learning options to serve nontraditional learners</td>
<td>Y4 Ecampus undergraduate enrollment*</td>
</tr>
<tr>
<td>We prioritize serving Oregon learners</td>
<td>Y5 Percent of undergraduate degrees awarded to Oregon residents</td>
</tr>
<tr>
<td>We maintain quality and assess learning outcomes</td>
<td>Y6 Percentage of academic program reviews and student learning outcome assessments completed</td>
</tr>
<tr>
<td>Our campus environments support student success</td>
<td>Y7 Scores on NSSE regarding supportive campus environment</td>
</tr>
<tr>
<td>We integrate research and discovery in the learning experience</td>
<td>Y8 Engagement of students in faculty research and discovery</td>
</tr>
</tbody>
</table>
### Core Theme 2: Research and Graduate Education

<table>
<thead>
<tr>
<th>Mission Fulfillment</th>
<th>Yardstick</th>
<th>Links to Indicators:</th>
<th>Exceeds Expectations</th>
<th>Meets Expectations</th>
<th>Falls Below Expectations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Our faculty is research active</td>
<td>Y9</td>
<td>2.1.5</td>
<td>Ratio exceeds 0.8</td>
<td>Ratio is between 0.6 and 0.8</td>
<td>Ratio is below 0.6</td>
</tr>
<tr>
<td>Our external research funding profile is strong</td>
<td>Y10</td>
<td>2.1.1</td>
<td>Increasing significantly</td>
<td>Increasing</td>
<td>Decreasing</td>
</tr>
<tr>
<td>Our research faculty is productive</td>
<td>Y11</td>
<td>2.1.6</td>
<td>Rate exceeds 75%</td>
<td>Rate is between 50 and 75%</td>
<td>Rate is below 50%</td>
</tr>
<tr>
<td>We are training the next generation of scientists and scholars</td>
<td>Y12</td>
<td>2.2.2</td>
<td>Ratio exceeds 0.10</td>
<td>Ratio is between 0.05 and 0.10</td>
<td>Ratio is below 0.05</td>
</tr>
<tr>
<td>We maintain quality and assess learning outcomes</td>
<td>Y13</td>
<td>2.3.1</td>
<td>Rate exceeds 90%</td>
<td>Rate is between 80 and 90%</td>
<td>Rate is less than 80%</td>
</tr>
</tbody>
</table>

### Core Theme 3: Outreach and Engagement

<table>
<thead>
<tr>
<th>Mission Fulfillment</th>
<th>Yardstick</th>
<th>Links to Indicators:</th>
<th>Exceeds Expectations</th>
<th>Meets Expectations</th>
<th>Falls Below Expectations</th>
</tr>
</thead>
<tbody>
<tr>
<td>We provide robust professional and continuing education</td>
<td>Y14</td>
<td>3.1.2 3.1.3</td>
<td>Diversity of programming is high and enrollment is growing</td>
<td>Diversity of programming is high and enrollment is stable</td>
<td>Diversity of programming is low and enrollment is falling</td>
</tr>
<tr>
<td>We collaborate actively with Oregon communities</td>
<td>Y15</td>
<td>3.1.4 3.2.1 3.2.2 3.2.3 3.2.4</td>
<td>Diverse collaborations throughout the state, with external funding</td>
<td>Diverse collaborations throughout the state</td>
<td>Limited collaborations in few areas</td>
</tr>
<tr>
<td>We maintain a physical presence throughout Oregon with research, Extension and outreach activities</td>
<td>Y16</td>
<td>3.2.1</td>
<td>Rate is 90% or higher</td>
<td>Rate is between 65 and 90%</td>
<td>Rate is below 65%</td>
</tr>
<tr>
<td>We are commercializing OSU innovations</td>
<td>Y17</td>
<td>2.1.2 3.3.1 3.3.5</td>
<td>Increasing significantly</td>
<td>Stable or increasing</td>
<td>Decreasing</td>
</tr>
</tbody>
</table>

*Yardstick associated with a university metric that the institution tracks for SP3.0.*
Determining Thresholds for Mission Fulfillment Yardsticks

The thresholds for the mission fulfillment yardsticks are based on the range of similar metrics for all R1 land grant universities, as determined using IPEDS data, and OSU’s internal expectations for continuous improvement as appropriate to each yardstick.

The thresholds established for Core Theme 1 yardsticks Y1 and Y2 and for Core Theme 2 yardsticks Y9, Y11 and Y12 reflect the range of ratios or percentages for R1 land grant universities. OSU benchmarks expectations of mission fulfillment for these yardsticks as:

- **Exceeds Expectations** corresponds to above the 75th percentile for all R1 land grant universities.
- **Meets Expectations** corresponds to the 25th to 75th percentile for all R1 land grant universities.
- **Falls Below Expectations** corresponds to ratios or percentages that are below the 25th percentile for all R1 land grant universities.

The thresholds established for Core Theme 1 yardstick Y6 and Core Theme 2 yardstick Y13 reflect NWCCU’s recommendations for conducting timely academic program and student learning outcome reviews. The thresholds for the remaining yardsticks (Y3, Y4, Y5, Y7, Y8, Y10, Y14, Y15, Y16 and Y17) are directional and reflect the university’s internal expectations for continuous improvement that are fundamental to fulfilling its mission, strategic goals and academic commitments.

Mission Fulfillment for Core Theme 1: Undergraduate Education

**Summary:**

OSU strongly fulfills its mission for Core Theme 1. As noted in Chapter 4, each of the four objectives has a set of indicators that points to mission fulfillment, and the collective results from the eight mission fulfillment yardsticks support this determination. Further evidence of the achievements of the objectives for Core Theme 1 is provided by the progress the institution has made in meeting the aspirational targets for Goal 1 in SP3.0. This includes the six-year graduation rate, degrees awarded and growth in enrollment of domestically underrepresented students at OSU.

OSU has identified, as a central strategic plan goal, the provision of a transformative educational experience for all learners. SP3.0 detailed a number of strategies and metrics associated with promoting student success through learning experiences and outcomes that seamlessly integrate teaching and research efforts and transform both learners and the world. Pursuit of this goal is also guided by the core theme focused on the undergraduate experience. The four objectives delineating OSU’s implementation of a transformative undergraduate experience reflect a deep commitment to accessible learning opportunities, rigorous degree programs, supportive learning environments and innovative curricula.

Providing access to high-quality educational experiences for all learners is evidenced by increasing access and enrollments in all modalities at all levels — in Corvallis, at OSU-Cascades and online — and increasing retention and graduation rates. OSU is aware that more work is to be done to support the success of students from historically underrepresented groups and Pell-eligible students. While OSU has increased first-year retention rates, it aims to improve these rates across all demographic groups as part of the continuing effort to improve six-year graduation rates. Oregon State University strongly fulfills this mission element related to Objective 1.1: providing broad and continuing access to undergraduate university degrees for the people of Oregon and beyond.
Through the cycle of academic program reviews and annual program-level student learning assessments, OSU demonstrates a commitment to maintaining the quality, relevance and rigor of its undergraduate academic programs. Since 2011, the university has reached 100 percent compliance with Undergraduate Academic Program Reviews and 100 percent participation with annual assessment of program-level student learning outcomes. The campus community has embraced full-cycle assessment, and there is strong evidence that faculty and academic leadership use program review results and assessment of student learning outcomes to make improvements and implement change. Continuing to explore improvements in the undergraduate and graduate curriculum remains a priority for the Office of the Provost leadership and for the Faculty Senate. Oregon State University strongly fulfills this mission element related to Objective 1.2: providing rigorous and effective undergraduate degree programs.

The most recent cohorts of first-time, full-time freshmen indicates some positive separation in first-year retention rates between students who participated in a first-year experience course versus those who did not, and OSU will continue to study these numbers to assess the value of these courses. OSU is encouraged to see large increases in percentages (12 and 10 percentage points) of respondents to the Campus Inclusivity Surveys who indicated two or more contacts with OSU representatives who helped them to succeed, and that at least two resources were somewhat or very accessible to them. The university understands that having a sense of belonging or connection to OSU is associated with student success. Oregon State University fulfills this mission element related to Objective 1.3: providing a supportive and healthy learning environment for student success and leadership development at all levels, but the institution embraces the reality that there are further investments and commitments by the entire university community that are needed to ensure this sense of belonging exists for all students.

OSU faculty are dedicated to the research mission of the university, and many of them engage undergraduates in their ongoing research by providing research opportunities in their labs or by bringing their research into their classrooms. A consistent draw for students to OSU is the strength and breadth of its collaborative research enterprise. There is evidence that students are engaging in experiential learning opportunities at an increasing rate, they value the integration of knowledge discovery and development into the undergraduate curriculum, and rate these experiences and the innovative faculty as very important to their undergraduate careers. Oregon State University fulfills this mission element related to Objective 1.4: using faculty research and scholarship to enrich the undergraduate curriculum.

The following provides further evidence of mission fulfillment using Core Theme 1 Yardsticks.

**Mission Fulfillment: We retain our students**

#### Yardstick 1: The first-year retention rate for first-time, full-time degree-seeking students (Indicator 1.1.4)

OSU is meeting expectations as defined using the mission fulfillment yardsticks.

The institution’s average first-year, full-time freshman retention rate over the past seven years has steadily increased from 81.4 percent to 84.8 percent, solidly within the 80-90 percent range for R1 land grant universities.

OSU continually strives to increase its retention and persistence rates. The SP3.0 aspirational target for this retention rate was 88 percent, and while results have fallen short of that aspirational target, several initiatives are underway for improving this metric. OSU also recognizes that retaining students is a commitment to all students, not just the first-time, full-time degree-seeking students. Thus, it is also important to track information on retention and continuation rates for all students to better understand factors that impact their academic success.
The focus of the Undergraduate Student Success Initiative (USSI) includes creating a seamless, transformative educational experience from entry to graduation and improving year-to-year retention and persistence rates for all students.

**Mission Fulfillment: We graduate our students**

Yardstick 2: *The six-year graduation rate for first-time, full-time degree-seeking students (Indicator 1.1.3)*

OSU is meeting expectations as defined using the mission fulfillment yardsticks.

The institution’s six-year graduation rate for first-time, full-time entering students has improved over the current accreditation cycle and has risen to 67 percent for students entering in Fall 2012. OSU is solidly in the mid-range of the six-year graduation rates for all R1 land grant universities. OSU has also met its SP3.0 aspirational target for this metric.

**Mission Fulfillment: Students from all backgrounds succeed**

Yardstick 3: *Gaps in graduation rates for diverse students (Indicators 1.1.3 and 1.1.4)*

OSU is meeting expectations in closing the graduation gaps, but there remains much work to do to reach parity among graduation rates for all students.

OSU is committed to decreasing and eventually eliminating graduation and retention gaps among all learner groups. Graduation rate gaps for first-year, full-time cohorts entering after 2009 have closed relative to the earlier decade.

In Chapter 4, Indicator 1.1.4, Figure 1.1.4C shows the graduation and retention gaps for historically underrepresented students (denoted by URS) and the gaps for all other students (denoted by Non-URS). The gap in six-year graduation rates for historically underrepresented students and non-historically underrepresented students is closing for students entering in 2009 and later. Both populations have shown significant increases in graduation rates over the past decade.

Although the yardstick reflects graduation rate gaps, the mission to have students from all backgrounds succeed at OSU requires that the institution understand the progression of its students and design and implement support systems for students’ transition from admission to degree completion.

**Mission Fulfillment: We are providing online learning options to serve nontraditional learners**

Yardstick 4: *Ecampus undergraduate enrollment (Indicators 1.1.1 and 3.1.1)*

OSU is exceeding expectations for providing alternative access to OSU undergraduate degrees and certificates.

Ecampus, ranked third in the nation for online bachelor’s degree programs by *U.S. News & World Report* in 2019, has more than doubled its enrollments for first-time degree-seeking freshman and transfer students since 2011. Degrees awarded to non-historically underrepresented students, Hispanics, veterans, and nontraditional-age students have more than tripled since 2011. Ecampus enrollments for all students have greatly exceeded the 2017-18 targets set in SP3.0.

In addition, the growing number of degrees offered online in business, engineering and other STEM fields are targeting a high industry need. For example, enrollments in OSU’s computer science post-baccalaureate degree online have increased from 101 students in summer 2012 to over 1,500 students in fall 2018.
Mission Fulfillment: We prioritize serving Oregon learners
\textit{Yardstick 5: Percent of undergraduate degrees awarded to Oregon residents (Indicator 1.1.5)}

OSU is meeting expectations for mission fulfillment to prioritize serving Oregon learners.
OSU is Oregon’s statewide research-intensive university and is committed to serving Oregon residents. This commitment is examined by looking at both enrollments and degrees awarded. In 2018, 71.2 percent of OSU’s Corvallis undergraduate enrollment were Oregon residents. At OSU-Cascades, 88.4 percent of the enrollment were Oregon residents. Over the past seven years, Oregon residents have accounted for approximately 70 percent of the share of the degrees awarded to students studying at campuses in Corvallis and Bend. In addition, OSU serves a growing number of Oregon residents through online degrees and certificates, as well as noncredit professional offerings.

OSU’s Board of Trustees has given overarching direction on serving resident learners. In October 2015, in preparing the first 10-Year Business Forecast, the board gave directional guidance that the university would keep undergraduate enrollment at the Corvallis campus at or above two-thirds Oregon residents.

Mission Fulfillment: We maintain quality and assess learning outcomes
\textit{Yardstick 6: Percentage of academic program reviews and student learning outcome assessments completed (Indicators 1.2.1 and 1.2.2)}

OSU is exceeding expectations for maintaining the quality of its academic programs and has developed a culture of assessment to improve student learning outcomes and achievement.
OSU has prioritized full-cycle student learning outcome assessment. Since mid-cycle of the accreditation period, the percentage of undergraduate academic programs that have completed these reviews and assessments has increased from just over 50 percent to 100 percent. The results of the student learning outcome assessments are being used to improve the undergraduate curriculum, leading to improved student learning outcomes for the academic programs and courses.

Over the next few years, OSU is committed to taking a deeper dive into understanding and enhancing student learning outcomes for all students, with a focus on students from nontraditional and historically underrepresented populations. Progress made toward enhancing student learning outcomes and student persistence is discussed in detail in Chapter 4.

Mission Fulfillment: Our campus environments support student success
\textit{Yardstick 7: Scores on NSSE regarding supportive campus environment (Indicator 1.3.4)}

OSU is meeting expectations for creating and fostering a campus environment that supports student success.
Based on the scores from the NSSE survey conducted in 2013 and 2016, OSU is performing at a high level for providing a supportive campus environment. While OSU is performing well on the NSSE ratings, there remains much work to be done to help students better cope with academic and nonacademic responsibilities. The increasing prevalence and severity of student mental health issues, and their negative impacts on student academic success, is a growing national concern. OSU, through its investment in student support services — including Counseling and Psychological Services (CAPS), the Career Development Center, the Office of Institutional Diversity and critical first-year/transition-year curriculum — is seeking to dramatically transform the environment for academic success and inclusive excellence on its campuses.
**Mission Fulfillment: We integrate research and discovery in the learning experience.**

**Yardstick 8: Engagement of students in faculty research and discovery (Indicators 1.4.2, 1.4.3, 1.4.4 and 1.4.5)**

OSU is meeting expectations for engaging students in faculty research and discovery.

The institution has a strong commitment to providing a transformative education that integrates research and discovery into the learning experience of all majors, coupled with a commitment to enhance retention and graduation rates. Since 2014, OSU has tracked student participation in the Undergraduate Research, Scholarship and Arts (USRA) program. USRA targets first- and second-year students, and while the number of participants is small, there has been a 300 percent increase in participation since its inception. This includes a large growth in participation of first-generation students, transfer students and historically underrepresented students. And as noted in Chapter 4 (Indicator 1.4.4), the retention rate for USRA students has averaged 97 percent, well above the average OSU retention rate of 83 percent. Similar retention rate results are noted for NSF-funded REU and OSU STEM Leaders programs.

OSU faculty have infused and enriched the curricula with research and discovery, as highlighted by the examples in Indicator 1.4.2 and 1.4.3. Faculty from Corvallis, OSU-Cascades, HMSC and other research locations are committed to seek financial support and provide mentoring to enrich the undergraduate curriculum. Scaling up these efforts to reach a larger share of OSU students is part of the USSI and a priority for SP4.0.

**MISSION FULFILLMENT FOR CORE THEME 2: RESEARCH AND GRADUATE EDUCATION**

**Summary:**

OSU strongly fulfills its mission for Core Theme 2. Each of the three objectives and associated indicators supports mission fulfillment, and the collective results from the five mission fulfillment yardsticks signal Meets or Exceeds mission expectations.

OSU has been classified by the Carnegie Classification of Institutions of Higher Education as a R1 Doctoral University with very high research activity since the mid-1990s. This classification uses a research activity scale that includes information from NSF and IPEDS on research and development expenditures in science and engineering, research and development expenditures in non-science and non-engineering fields, science and engineering research staff and the number of doctoral conferrals in humanities, social sciences, STEM and other fields. In addition, Oregon State University is one of only two land, sea, space and sun grant universities in the United States. These two recognitions signal a strong commitment to research, undergraduate research experiences (and experiential learning), graduate student education and mentorship, and research partnerships with national laboratories and industry.

Research activity at OSU is grounded in the colleges, schools, departments, centers and institutes. Aiding the research of faculty, graduate students, postdoctoral scholars and undergraduates is a long-standing culture of low disciplinary walls and a high spirit of collaboration. This collaborative atmosphere is a key reason faculty across a range of disciplines, from STEM to social sciences and liberal arts, decide to take a position at OSU.
The three objectives outlined in Core Theme 2 support OSU’s mission and SP3.0. Further, the 16 indicators of achievement are in alignment with the strategies and metrics delineated in SP3.0. The information below summarizes the assessment of mission fulfillment for Core Theme 2.

OSU’s faculty have secured increased levels of funding over this accreditation cycle: 2018 represented a 34 percent increase relative to 2014. As noted in the discussion of Objective 2.1 in Chapter 4, this support comes from federal and state agencies, industry and foundations. While the data and examples demonstrate OSU’s efforts to create and maintain a diverse research and scholarship environment that consistently achieves high impact, OSU’s performance in achieving its SP3.0 targets is stellar. Total research and development expenditures and industry-funded research as a percent of total research and development expenditures are trending upward over the past seven years, demonstrating that ongoing efforts are having positive results. Research activity supports the infrastructure to deliver the highest quality learning environment for students to succeed, and the success of OSU faculty in securing external competitive grants speaks to the quality and relevance of their research, discovery and scholarship impacts. There are positive impacts on student learning outcomes, as demonstrated by student participation in examples of research excellence and innovation in OSU’s signature areas of distinction.

OSU has attracted, retained and supported — primarily through research grants and a broad set of graduate programs — an increasingly diverse graduate student population. OSU’s strategic plan metrics also provide a consistent data source to assess progress for Objective 2.2: master’s and doctoral degrees awarded (as part of the total degrees awarded metric), doctoral degrees awarded, and total R&D expenditures. All three strategic plan metrics have been trending positively within the past seven years. The data and examples demonstrate OSU’s ongoing efforts to provide high-quality training and support to graduate students and prepare them for post-graduation opportunities.

The following provides further evidence of mission fulfillment using Core Theme 2 Yardsticks.

**Mission Fulfillment: Our faculty is research active**

**Yardstick 9: Ratio of tenured/tenure-track faculty to total instructional faculty (Indicator 2.1.5)**

OSU is meeting expectations for faculty being research active.

OSU is a research-intensive institution, having earned $382 million in external research funding in 2018. As such, faculty are major contributors to achieving the research mission. Research-active faculty contribute not only to the research mission, but also to student success by bringing research into the classroom. This connection is noted in the discussion of Yardstick 8: engagement of undergraduate students in faculty research and discovery. A significant number of OSU’s faculty that are involved in undergraduate and graduate instruction are from the tenured/tenure-track faculty and are research active; OSU’s ratio of tenured/tenure-track faculty to total full-time instructional faculty is approximately 0.68 (2016-17 data). This is solidly within the meets expectations range of all R1 land grant universities.

**Mission Fulfillment: Our external research funding profile is strong**

**Yardstick 10: Total R&D expenditures (Indicator 2.1.1)**

OSU is exceeding expectations with its external research funding profile and level.

Over fiscal years 2016-18, OSU faculty attracted $1.13 billion in external research funding, marking the three highest years in research funding in the university’s history. Research support drives discovery and innovation, but it also supports the infrastructure that is fundamental to delivery of the academic
MISSION FULFILLMENT, ADAPTATION AND SUSTAINABILITY

curriculum. Over the past decade, OSU has invested in state-of-the-art infrastructure, including research facilities in Newport and Corvallis, and is committed to a capital renewal trajectory for revitalizing aging labs and research facilities. The university's external funding profile is strong, with 45 percent of federal funds coming from the National Science Foundation and the balance of the federal funding from the Department of Agriculture, National Institutes of Health, Department of Defense and Department of Energy. Seven colleges have research expenditures over $16 million per year, and two colleges have expenditures in excess of $60 million per year.

**Mission Fulfillment: Our research faculty is productive**

**Yardstick 11: Percentage of faculty with high-impact national or international publications (Indicator 2.1.6)**

OSU is meeting expectations.

For 2017, the percentage of OSU research-active faculty who have one or more high-impact national or international refereed publications per year is 69 percent (data source: custom report provided by Academic Analytics). This percentage exceeds the percentage for all R1 land grant universities by more than 3 percentage points.

Over the past seven years, the share of OSU faculty who have had high-impact national or international scholarly publications has increased by more than 10 percentage points — from 58 percent in 2011 to 69 percent in 2017. While the breadth of faculty impacts and productivity via research is broader than this single measure, this yardstick demonstrates the significant number of OSU faculty who have achieved high-impact research outcomes that are nationally and internationally recognized.

**Mission Fulfillment: We are training the next generation of scientists and scholars**

**Yardstick 12: Ratio of doctoral degrees awarded to all degrees awarded (Indicator 2.2.2)**

OSU is meeting expectations with respect to this yardstick.

Oregon State University strives to provide a share of doctoral degrees awarded relative to all degrees awarded that is comparable to peer institutions. The institution’s ratio has remained stable over the past several years at 0.06 to 0.07, falling within the range of peer R1 land grant institutions.

**Mission Fulfillment: We maintain quality and assess learning outcomes**

**Yardstick 13: Percentage of graduate programs in compliance with full-cycle review (Indicator 2.3.1)**

OSU is exceeding expectations.

As discussed in Chapter 4, Oregon State is committed to rigorous program reviews and learning outcome assessments for both undergraduate and graduate programs and courses. The Graduate School, in partnership with the Faculty Senate, has established a robust, iterative system for graduate student learning assessment and program evaluation. These scheduled assessments and program review activities allow programs to critically examine objectives, curriculum, resources, student data and other relevant qualitative and quantitative material. The ongoing full-cycle assessment process, which includes stakeholders from across the university and the external community, ensures that the education students receive is relevant, high quality, and aligned with stated learning outcome objectives.
MISSION FULFILLMENT FOR CORE THEME 3: OUTREACH AND ENGAGEMENT

Summary:
OSU strongly fulfills its mission for Core Theme 3. As noted in Chapter 4 and discussed below, each of the three objectives has a set of indicators that points to mission fulfillment, and the collective results from the four mission fulfillment yardsticks support this determination.

Outreach and engagement is central to Oregon State University’s mission as a land grant institution, as evidenced by contributions from all academic colleges and programs and units across the institution. Additionally, more than 40 community-based learning hubs provide gateways to OSU while connecting the work of the university to local partnerships and issues. OSU’s deep collaboration with the communities it serves beyond the borders of its campuses has been recognized by the Carnegie Community Engagement designation.

Based on a 150-year-old tradition, the university’s outreach and engagement effort is guided by the principle of enhancing access to enrichment and problem-solving through reciprocal relationships. The aim is to exchange knowledge and resources in partnership with individuals, communities, businesses, industries, government and educational institutions. Three core theme objectives delineate OSU’s implementation of its outreach and engagement mission: delivery of programs and degrees to place-bound populations; sustained collaborations and purposeful partnerships; and activities that increase economic development and quality of life. Inherent in the function of outreach and engagement is expanding the concept of learners, instructional delivery and collaborative use of research results to address societal and economic needs.

Unparalleled growth and national recognition of OSU’s Ecampus programs underscore the fulfillment of Objective 3.1. There have also been significant upticks in the number of noncredit certificates awarded and participant counts. Perhaps most impactful for mission fulfillment is the youth development programs, which involved over 90,000 youth throughout the state, along with over 2,000 OSU students who receive practical experience and provide mentorship to the next generation of adults each year. OSU strongly fulfills this mission element related to Objective 3.1: extending transformative educational experiences to learners, communities and organizations using means beyond traditional classroom-based instruction.

A second objective of Core Theme 3 focuses on collaborations with communities and stakeholders. OSU has a strong presence throughout the state. OSU faculty have secured external funding to support the university’s outreach and engagement activities, and counties have increased their appropriations to offset declining state support. Collectively, this information reflects the effectiveness and impact of OSU’s operations and programs and enhances the partnerships and collaboration that are essential for change and improvement to occur. OSU strongly fulfills its objective to build and sustain collaborative and mutually beneficial partnerships to advance learning and research with communities and stakeholders.

As noted in Chapter 4, the total economic impact of OSU activities across Oregon is very large and well beyond appropriations and student aid provided by the state of Oregon. The breadth and amount of statewide programs and the impact of these efforts on OSU academic programs are substantial. The number of global partnerships has grown significantly, and the variety of startups show a solid contribution to pushing the limits of innovation. While there has been growth in the number of OSU students participating in study abroad programs, the number is small relative to OSU’s enrollment.
university is reviewing policies and mechanisms to enable more students to participate in such high-impact practices without taking on a greater financial burden. OSU fulfills this mission element, but will continue to build on its applied research in engineering, sciences, and health, as well as its global partnerships and networks to increase mission fulfillment in outreach and engagement.

The following provides further evidence of mission fulfillment using Core Theme 3 Yardsticks.

**Mission Fulfillment: We provide robust professional and continuing education**

**Yardstick 14: PACE offers a diversity of options suitable for professional and nontraditional learners (Indicators 3.1.2 and 3.1.3)**

OSU is meeting expectations.

OSU provides a diversity of noncredit and nondegree programming with stable enrollments. Professional and Continuing Education (PACE) delivers more than 200 professional online courses and certificate programs to learners near and far and has served an excess of 10,000 learners annually since 2014. OSU has seen strong growth in the awarding of noncredit PACE certificates, as well as in participation rates in PACE programs. The thresholds for mission expectations are internal benchmarks regarding the diversity of programs and the mission to increase the university’s reach throughout the region. Increasing reach beyond OSU campuses will ensure greater access for rural communities and diverse learners.

**Mission Fulfillment: We collaborate actively with Oregon communities**

**Yardstick 15: Collaborations are diverse and distributed widely (Indicators 3.1.4, 3.2.1, 3.2.2, 3.2.3 and 3.2.4)**

OSU is exceeding expectations.

OSU maintains diverse collaborations throughout Oregon. As detailed in Chapter 4, the university is dedicated to extending its research results to local contexts, convening communities of practice, and developing knowledge from collaborative work in communities. OSU has experienced growth in research funding for outreach and engagement activities over the past seven years. Applied research and educational partnerships are made possible by external funding and grant awards, which have increased since 2011-12.

With respect to value and quality, participants in Extension programs consistently rate program effectiveness very highly. The average score is about 5.5 on a scale of 1 to 6 (where 6 is excellent) on the Citizen Evaluation of Teaching (CET). The support provided by the counties to sustain OSU’s presence in rural communities is a further indication of the value of OSU’s faculty and engagement. Finally, following passage of Ballot Measure 99, and with funding from the Oregon Legislature, the OSU Extension Service is working in collaboration with schools and communities to launch the statewide Outdoor School program, building on a legacy that began in 1966.

**Mission Fulfillment: We maintain a physical presence throughout Oregon with research, Extension and outreach activities**

**Yardstick 16: Percentage of Oregon counties with an OSU campus, research facility or Extension office (Indicator 3.2.1)**

OSU is exceeding expectations.
OSU maintains a physical presence and meaningful programs statewide. Reflecting its mission to serve the people of Oregon, OSU has nearly 500 Extension faculty and staff located in all 36 counties. Volunteers also help deliver programs through master credentials — in gardening, food preservation, woodland management and beekeeping — in addition to supporting 4-H youth, Juntos students and their families and other program areas. Volunteers are essential to delivering more services and programs to communities.

**Mission Fulfillment: We are commercializing OSU innovations**

*Yardstick 17: Startups, invention disclosures and licensing revenues (Indicators 2.1.2, 3.3.1 and 3.3.5)*

OSU is meeting expectations.

Oregon State has a robust and stable culture of support for commercialization of university innovations through startups, invention disclosures and licensing of intellectual property. Established in 2013, OSU’s Advantage Accelerator supports innovation and entrepreneurship, captures valuable intellectual property across the university, funds high-risk, high-reward research, launches startups and grows relationships with industry. The total economic impact of OSU activities across Oregon is well beyond appropriations and student aid provided by the state of Oregon. Invention disclosures, a significant contributor to new startup businesses, have increased over the last seven years from a low of 59 per year to a total of 78 in 2017-18. As of December 2018, 33 inventions have been reported.

**MISSION FULFILLMENT AND SIGNATURE AREAS OF DISTINCTION**

OSU’s strong collaborative culture and steadfast commitment to academic excellence in its three signature areas of distinction — advancing the science of sustainable Earth ecosystems; improving human health and wellness; and promoting economic growth and social progress — provide a unique lens to further assess mission fulfillment in a more holistic and synergistic context. The intersection of education, research and engagement in these areas showcases OSU’s commitment to provide a robust and integrated learning environment for student success that draws from disciplines across the university.

The following provides an overview of each signature area of distinction and highlights collaborative outcomes for each of the three core themes. This overview complements the research examples under Indicator 2.1.4 in Chapter 4 and draws stronger connections with undergraduate education, graduate education, and outreach and engagement.

**Advancing the Science of Sustainable Earth Ecosystems**

Economic and social well-being is increasingly dependent on the health of the Earth to provide food, shelter and energy. OSU has a major research and educational commitment to advancing the science of sustainable Earth ecosystems and is a leader in teaching and engagement about the world’s marine and coastal environments, agricultural and forest resources, and the planet. OSU is one of only two land, sea, space and sun grant universities in the United States, and the colleges of Earth, Ocean, and Atmospheric Sciences, Agricultural Sciences, and Forestry are nationally ranked. Many of OSU’s undergraduate and graduate programs focus on natural resources science, management and policy, including interdisciplinary graduate degrees in marine resource management, water resources engineering, water resources science and environmental sciences, along with the undergraduate bioresource research major.
OSU’s Marine Studies Initiative (MSI) supports transdisciplinary research and teaching that emphasizes collaboration, experiential learning, problem-solving and community engagement (See Spotlight on MSI in Chapter 1). Bringing together scientists and students from multiple fields of study for joint research and outreach through the university’s interdisciplinary centers and institutes — including the Hatfield Marine Science Center, the Pacific Marine Energy Center and the Institute for Natural Resources — is the heart and soul of OSU’s commitment to collaboration and inclusive excellence.

**Undergraduate Education**

- **Matt Orr**, an assistant professor of biology, and **Ron Reuter**, an associate professor of natural resources, were awarded an Undergraduate Grand Team Challenge grant that allowed them to connect undergraduates at OSU-Cascades in a restoration project on the South Fork of the Crooked River in Central Oregon. Students collected baseline measurements and installed four beaver dam analog structures on the river.

- **BioResource Research** (BRR) is an interdisciplinary biosciences major aimed at understanding and protecting the planet’s biological resources and exploring their novel and sustainable uses. BRR students complete a comprehensive mentored research experience, in a cutting-edge area of agricultural, biological, chemical, environmental, food or health science. As of Fall, 2018, there are 48 students in the BRR major.

- In the College of Liberal Arts, graphic design and photography student Nick Kline enrolled in the Photographic Field Studies course at the Hatfield Marine Science Center in Newport in summer 2017. Kline focused on invasive species, hoping to provide an educational opportunity through his art to teach the community about the ocean.

**Research and Graduate Education**

- The **Oregon Explorer** is a collaboration of OSU Libraries and Press and the Institute for Natural Resources to create a natural resources digital library.

- Ellen Lamont, a Ph.D. student in the College of Earth, Ocean, and Atmospheric Sciences, received an award through the Fulbright U.S. Student Program, which will allow her to study, conduct research and teach abroad in India on the forces that created and continue to shape the Himalayas.

**Outreach and Engagement**

- The **Global Coral Microbiome Project**: The documentary film “Saving Atlantis” has been shown around the world. Narrated by Emmy award-winner Peter Coyote, this documentary tells the story of how OSU researchers and students are working to save the world’s coral reefs and oceans from the destruction of climate change and other human impacts.

- In the College of Agricultural Sciences, the **Tradeoff Analysis Project** develops modeling tools that can be used by research teams to improve the understanding of agricultural system sustainability and inform policy decisions. The tool is being applied by more than 770 users throughout the world.
Improving Human Health and Wellness

OSU’s teaching, research and outreach programs are at the forefront of addressing global health and nutrition needs. As the population grows, ages and diversifies, pressures on health care and well-being locally and globally continue to mount. This is especially true for chronic diseases, which impact the quality of life of 90 million Americans and are responsible for 70 percent of all deaths. Many chronic diseases result from complex interactions between infectious agents, people, animals and the environment. Identifying these relationships can improve health outcomes across populations and create opportunities to reduce the impact of chronic disease.

With strong academic programs in public health, agricultural sciences, science, pharmacy and veterinary medicine, along with related health research in the life and environmental sciences, OSU scholars address the health impacts of micronutrients, pollutant exposure and exercise, as well as the molecular mechanisms of diseases such as ALS, cancer and cardiovascular disease. Partnerships with social science and public policy programs address challenging and emerging public health and environmental health issues with significant local and global impact, and programs in the humanities shape individual and collective responses to human disease, disability and social and medical interventions.

Undergraduate Education

- The College of Public Health and Human Sciences received accreditation from the Council on Education for Public Health in 2014. This raises the college’s visibility and reputation, ensures the quality of students’ education and the value of their degrees, and increases the ability to attract committed students and world-class faculty. The undergraduate degree program in kinesiology is ranked first in Oregon, second in the Pac-12 and 29th out of 458 nationally.

- The Applied Experimental Economics Lab (AEELab) is a teaching/research lab in the College of Agricultural Sciences dedicated to enhancing understanding of how people and firms think about economic decisions, deal with questions of inequality and fairness, nutrition, health and wellness, and make consumption choices.

Research and Graduate Education

- Shay Bracha, a canine oncologist at OSU’s Veterinary Teaching Hospital, investigates how cancer cells modify their environment to increase invasiveness and metastasis. These studies have led to the discovery of novel biomarkers that may be used to detect cancer at an early stage, improving the chances for longer remissions and survival.

- The College of Pharmacy is co-located at Oregon Health & Science University in Portland, allowing broad collaboration with scientists and clinicians at both institutions. A team of researchers are in the early design stages of new nano-tools that can carry cancer-fighting drugs through the bloodstream right to the site of a tumor.

- Elizabeth Kaweesa, a Ph.D. student in biochemistry from Uganda, along with chemistry assistant professor Sandra Loesgen and OSU colleagues, have discovered a bacterium found in soil that can help kill melanoma cells — a skin cancer that strikes 80,000 people and causes 9,000 fatalities each year.
Outreach and Engagement

- OSU’s [partnership](#) with the Oregon Humane Society gives students in the Carlson College of Veterinary Medicine hands-on experience learning about high-volume, high-quality medicine and surgery in a state-of-the-art facility.
- [Go Baby Go](#) is a national, community-based research, design and outreach program that provides modified ride-on cars for children up to age 3 who experience limited mobility.

Promoting Economic Growth and Social Progress

Great ideas change the world. Daunting global challenges — from inequalities in health care, education and security of incomes to increasing pressures on the world’s natural resources — call for innovative and relevant discoveries to deliver essential services and greater prosperity for all citizens. Sound, science-based technologies are at the core of these innovations. Integration of entrepreneurship, industry partnerships and commercialization bring these innovations from discovery to delivery. Robots, unmanned aerial vehicles, underwater gliders and satellite tracking are a few of the technologies under development by OSU students, scientists and engineers.

Oregon State University has established a reputation for innovation, cutting-edge research and engagement with industry and government partners to promote economic growth and social prosperity for all. The university achieves these impacts by nurturing a collaborative culture of discovery and innovation statewide while embracing the requirements for sustaining economic prosperity and educating future leaders and innovators. Leveraging its strengths in engineering and business, OSU draws on the diversity of disciplines and skills from all corners of campus and the state to create a strong platform for innovation, prosperity and relevance. OSU is innovating its undergraduate curriculum so that students can creatively and effectively meet high need areas. The colleges of Business and Engineering both increased undergraduate enrollment by more than 60 percent over the last 10 years.

Undergraduate Education

- The College of Business is ranked number one in the world for [experimental research](#) in accounting, which uses methods from behavioral sciences to understand financial decisions and communications.
- OSU’s [Juntos](#) program serves 3,500 Latinx sixth- to 12th-grade students and their families in more than 33 school districts. With support from local partners, 100 percent of the students who have completed the Juntos program have graduated from high school, and 92 percent have gone on to college.
- The College of Agricultural Sciences offered [service-learning trips](#) to Puerto Rico in the aftermath of hurricanes Irma and Maria. Faculty members from the colleges of Engineering, Education and Science also participated, adding an interdisciplinary scope to the students’ experience. Students worked with contacts in Puerto Rico to develop projects that would benefit the community.
Research and Graduate Education

• The robotics program in the College of Engineering is ranked fourth in the U.S. One of the most prominent developments to come out of the Collaborative Robotics and Intelligent Systems (CoRIS) Institute is the Cassie project, which has been called one of the “most human-like” or “biologically inspired” walking machines in the country.

• OSU is educating the next generation of leaders in higher education. The Adult and Higher Education (AHE) program in the College of Education is a nationally recognized doctoral program. Since 2002, the program has had 110 graduates who are mid- and executive-level administrators at community colleges and universities across the country. Among the distinguished alumni are 27 former or sitting community college presidents.

• OSU chemist Mas Subramanian and his team discovered a new blue pigment for use in industrial coatings and plastics to help buildings cool and reflect infrared sunlight. The new color sparked worldwide interest and prompted Crayola in 2017 to launch a new crayon color: Bluetiful.

• In the College of Liberal Arts School of Public Policy, Associate Professor Hilary Boudet received a $1 million grant from the National Science Foundation’s Smart and Connected Communities Program to help households reduce economic and environmental costs through the use of “smart” meters and appliances.

Outreach and Engagement

• The Rural Studies Program, a collaboration of the colleges of Agricultural Sciences and Liberal Arts, provides teaching, research and outreach opportunities in rural communities. Student and faculty interactions focus on rural poverty, food security and food systems, community vitality, and rural wealth creation.

• The Center for Research on Lifelong STEM Learning enhances understanding of how people with diverse life circumstances and identities become lifelong learners, practitioners and researchers.

• The Oregon State University Advantage Accelerator brings cutting-edge ideas to market by connecting innovators and entrepreneurs to the resources they need for success, assisting technology-based, early-stage companies from the mid-Willamette Valley and extended Oregon State University community. Students have the opportunity to join the program as interns and work with businesses through entrepreneurship courses.

• Precision agriculture systems — including everything from geo-referenced grid soil sampling to variable rate application of fertilizer — have seen significant market penetration within the past decade in the U.S. Rambuta Remote Sensing, a research product conducted by DAMlab Makerspace manager Dale McCauley, is developing a system for drone-based monitoring and data collection about plant stress, prevalence of pests and disease outbreaks. VentureWell/ National Collegiate Inventors and Innovators Alliance are funding the project to develop their hyperspectral high-value crop imaging system and a paired ground-based sensor array.
5.B. ADAPTATION AND SUSTAINABILITY

5.B.1

Within the context of its mission and characteristics, the institution evaluates regularly the adequacy of its resources, capacity and effectiveness of operations to document its ongoing potential to fulfill its mission, accomplish its core theme objectives and achieve the goals or intended outcomes of its programs and services, wherever offered and however delivered.

The university regularly assesses its organizational structure, allocation of human resources and physical capital, and procedures and practices to ensure it is fulfilling its mission to maximum effectiveness at a manageable and appropriate cost. Three recent initiatives — a redesign and realignment of functions under the provost, an evaluation of efficiencies and associated organizational changes in the Division of Finance and Administration, and the integration of compliance, audit and enterprise risk management functions — are examples.

Redesign of the Provost’s Portfolio

In fall 2017, Provost Edward Feser initiated a strategic and operational realignment of functions and roles reporting to the provost. Redesign decisions were guided by a systematic self-review by the provost’s senior leadership team that sought to discover ways of balancing various leaders’ portfolios; eliminating ambiguities in authority; reducing duplication and leveraging strengths; and clarifying responsibilities and authorities. Key goals were to minimize divisional silos that have a tendency to drive administrative costs upward and to implement best practices in the oversight and delivery of programs and services.

The result was a set of senior leadership portfolios that are more balanced as to responsibility and workload, that have clearer areas of strategic focus:

- **Office of Faculty Affairs** (previously Division of Academic Affairs): Led by the senior vice provost, this portfolio includes responsibility for policies and programs to recruit, retain and develop the very best faculty and professional staff; faculty development programs; academic personnel policy; professional faculty personnel policy; facilitation of the development of the university’s strategic plan; oversight of accreditations; and recently, leadership for the university’s transition to a faculty union.

- **Division of Enrollment Management** (previously a part of the Student Affairs portfolio): Enrollment management will be led by a vice provost, a newly elevated position at the university that is being recruited as of this writing. Once appointed, the vice provost will lead a new era of enrollment management at OSU, bringing greater focus, vision and coordinated strategy to recruitment, admissions, financial aid and retention. Going forward, this position will report directly to the provost and executive vice president and will guide the university’s efforts to set and fulfill strategic enrollment goals, identify new and creative means to grow enrollment, enhance access by leveraging scholarships and aid, harness data and technology to maximum benefit and provide outstanding support to all learners.

- **Division of Information and Technology** (formerly Division of Information Services): Led by the vice provost for information and technology/chief information officer, this portfolio is responsible for providing technology services as well as the newly created central university organization responsible for institutional analytics and business intelligence (the Office of Analytics and Institutional Research).
• **Division of Student Affairs**: Led by the vice provost for student affairs, this portfolio includes responsibility for centrally provided academic support and student life services for domestic and international students. The realignment reflects the multiple intersecting dimensions of students’ experiences, including the areas of academic success, health and well-being, career development, community and civic engagement and leadership development.

• **Office of Undergraduate Education** (formerly Division of Undergraduate Studies): Led by the vice provost for undergraduate education, this portfolio includes responsibility for advancing the university’s goals of offering high-quality undergraduate programs on-site, online and in hybrid format; designing diverse, well-supported and affordable pathways to an OSU degree; creating more opportunities for student research and experiential learning; and delivering instruction using leading-edge pedagogies and technologies.

• **Ecampus** (formerly Division of Extended Campus): In recognition of the scale and growing importance of online education in OSU’s education offerings, the direct reporting line for Ecampus moved from a vice provost to the provost and executive vice president. Led by an associate provost, Ecampus provides access to quality education with over 50 online degree programs.

• **Office of International Affairs** (formerly Division of International Programs): Previously managed by a vice provost, the Division of International Programs was dismantled, and its units — the Office of International Services and the Office of Global Opportunities (study abroad) — were moved to other divisions. The vision is to reduce confusion among students as to where to seek support (the Division of Student Affairs, whether international or domestic); to ensure appropriate academic oversight and governance of programming (e.g., study abroad programs, requirements, articulation, etc.); and to extend the responsibility for meeting OSU’s internationalization goals across multiple senior leaders, rather than charging a single international administrator. In this way, OSU is pursuing its internationalization goals much like it is pursuing its diversity and inclusion goals: as a shared charge and responsibility.

Specifically, the Office of International Services moved under the Division of Student Affairs, because it is principally a student-support function. The Office of Global Opportunities moved under the Office of Undergraduate Education, since it oversees a set of predominantly undergraduate academic programs. The Office of International Affairs, led by the special advisor to the provost for international affairs, was then created to work with the faculty, colleges and central leadership to develop and oversee the implementation of a comprehensive internationalization strategy consistent with the goals articulated in the university’s strategic plan. The new model charges multiple central leaders — the senior vice provost, the vice provost and dean of the Graduate School, the vice provost for undergraduate education, and the vice provost for student affairs, among others — with overseeing the delivery of various programs supporting OSU international goals. The overall effort is coordinated by the senior advisor.

The management portfolios of the vice provost and dean of the **Graduate School** and the vice provost for **University Outreach and Engagement** remained mostly unchanged.

The realignment had a significant positive impact on OSU students and faculty by clarifying roles and responsibilities for OSU senior leadership and the core university service providers they oversee; making points of academic service and support more legible to campus stakeholders; and positioning OSU to direct more attention and resources to strategic enrollment management, proactive faculty development and excellence and outstanding delivery of programs and services.
Organizational Changes and Strategic Projects in the Finance and Administration Portfolio

Michael Green, vice president for finance and administration, recognized the need to ensure that the university’s support functions are in alignment with the OSU strategic plan, and that limited resources are deployed in ways that best serve the needs of the university community. To this end, the Division of Finance and Administration (DFA) sought external reviews of its human resources functions (2016), business operations (2017), capital project development processes (2017-18) and public safety activities (2018). In all cases, the reviews resulted in a number of recommendations to reconsider organizational structures, policies, work processes and technology platforms for improved effectiveness and efficiency.

Operating under the oversight of leaders from across the university, specific work groups were charged with developing multiyear project plans to evaluate and implement the recommendations with broad stakeholder input. These plans continue to be developed and implemented. A few of the recent outcomes are described below:

Organizational Changes:

- **Senior Associate Vice President for Administration (SAVPA):** DFA has a very broad portfolio, and the SAVPA position provides for more effective leadership and oversight for several critical functions, including facilities, capital planning, transportation, public safety, risk services, environmental health and safety, and information technology. Managing these functions together allows for more collaboration and efficiencies of scale. The SAVPA is also empowered to act on the vice president’s behalf in his absence.

- **Chief Human Resources Officer (CHRO):** The CHRO was an existing position, but it has been elevated to be a university-wide strategic leader. The new CHRO is leading the improvement of HR services delivery, while also partnering closely with deans and other leaders to make holistic long-term plans regarding OSU’s workforce.

- **Director of Information Technology:** A new position for DFA, the director of IT reports to the SAVPA and is tasked with evaluating and coordinating the division’s technology infrastructure and systems needs. The director of IT will collaborate with the university’s central Division of Information and Technology on broad projects and resource allocation.

Ongoing Efficiencies and Improvements:

- **Framework for Success:** An outgrowth of the business operations project, the division leadership team and managers are developing a set of guiding principles, key performance indicators and metrics. The framework helps ensure that measurable outcomes are fully aligned with the university’s goals and mission.

- **eProcurement:** OSU’s BennyBuy initiative is moving the university toward a fully integrated technology system for contracting, purchasing and accounts payable. The goal is to streamline processes for users while providing a tool for data analytics that the university can leverage for cost savings and other efficiencies.

- **Fiscal Policy Program:** A formal program with a designated fiscal policy offer and an executive oversight body, the Fiscal Policy Program provides a systematic way to regularly evaluate and revise the university’s financial policies and rules to ensure effective guidance for compliance purposes while also providing flexibility for day-to-day operations without being overly restrictive.
• **Redesigned student hiring processes:** With an average of 4,300 student appointments and 2,660 graduate students hired across the university each year, it became critical to improve the efficiency, transparency and consistency of recruitment and hiring processes. The Office of Human Resources and a stakeholder advisory body developed an information technology solution to streamline the way undergraduate students and graduate assistants are hired. The new programs will be fully implemented by Spring 2019.

• **Development of Long-Range Planning Tools:** Units in the DFA have been refining a set of tools, such as 10-year capital and business forecasts, that help leaders better evaluate future initiatives and projects for cost effectiveness and return on investments. By monitoring the status of a set of board-approved financial metrics, leaders are also protecting the long-term financial health of OSU.

• **Addressing the Deferred Maintenance Backlog:** Historically, capital maintenance has not been adequately funded by the state. Recognizing how critical infrastructure and facilities are to student and faculty recruitment as well as research success, division leaders continue to develop solutions to address this challenge. DFA staff are working closely with the region’s power supplier to make long-term investments in modernizing the university’s electricity infrastructure for better reliability and safety. At the same time, the university created a capital renewal fund, dedicating an annual budget increment of $5 million until the fund reaches $45 million annually. The capital renewal fund, together with other capital plans over the next decade, is projected to reduce the deferred maintenance backlog from its current estimate of $641 million to $374 million by 2026.

**Reorganization of Compliance, Audit and Enterprise Risk Management Functions**

OSU created an Office of University Compliance in 2014 to develop and oversee a systematic institutional compliance program and set of practices. While the program was working well, the departure of the chief compliance officer to another university in mid-2018 created an opportunity to review national trends in the management of auditing, risk and compliance across U.S. research universities. That effort determined an emerging trend is the alignment of audit, risk, and compliance functions under a single office, overseen by a chief audit, risk and compliance officer. In late 2018, OSU elected to adopt this model, bringing the Office of Audit Services and the Office of University Compliance together. The new unit — the Office of Audit, Risk and Compliance (OARC) — takes advantage of operational synergies between auditing and compliance and enhances OSU’s ability to manage risks related to cybersecurity, lab safety, natural hazards and more. The office also assists with OSU’s efforts to prevent and respond to sexual violence and increase employees’ knowledge of key risks through critical employee training; improves communication among the functions; increases the ability to create effective and efficient mitigation strategies; and expands opportunities for staff growth and succession planning.

The new office’s mission includes:

- **Auditing:** OARC performs independent internal audits and provides objective assurance and advice aimed at improving university operations, bringing a systematic, disciplined approach to evaluating and improving risk management, control and governance processes.

- **Risk Management:** OARC provides oversight of the university-wide risk assessment program by creating and maintaining a framework for effectively identifying, assessing and managing risk. OARC’s role does not include supervision of the enterprise risk services department, which assists departments in their individual risk management assessments and administers the university’s insurance programs.

- **Compliance:** OARC provides oversight of the institutional compliance program and the distributed processes that support compliance across the university.
A director of compliance reports to the chief audit, risk and compliance officer, and the Office of General Counsel provides all legal advice and counsel on legal risk priorities. The director of compliance continues to be advised by a Compliance Executive Committee, chaired by the provost. Other members of the committee are the vice president for finance and administration, the vice president for research, the general counsel, the senior vice provost for faculty affairs, the Faculty Senate president, and the chief audit, risk and compliance officer. In addition to managing the university accountability and integrity hotline, OARC is the immediate point of contact for questions about compliance, risk and audit matters. When appropriate, the office refers issues to other campus units, including the Division of Finance and Administration and the Office of General Counsel.

5.B.2

The institution documents and evaluates regularly its cycle of planning, practices, resource allocation, application of institutional capacity and assessment of results to ensure their adequacy, alignment and effectiveness. It uses the results of its evaluation to make changes, as necessary, for improvement.

5.B.3

The institution monitors its internal and external environments to identify current and emerging patterns, trends and expectations. Through its governance system, it uses those findings to assess its strategic position, define its future direction and review and revise, as necessary, its mission, core themes, core theme objectives, goals or intended outcomes of its programs and services and indicators of achievement.

As described in Chapters 2 and 3, Oregon State University’s planning consists of comprehensive strategic planning, which informs annual and long-term planning and evaluation oversight from the Board of Trustees; annual planning, which originates at the unit level and creates alignment and cohesion between the university, college, and unit levels; and a 10-year business and capital forecast to inform financial, enrollment and capital planning. Figure 3.A.1 in Chapter 3 provides a schematic of the university’s approach to planning.

Regularized Strategic Planning

OSU’s current institutional strategic planning process was established in 2003 under the leadership of President Edward Ray. The process has led to an evolving set of metrics to track university outcomes, including retention, diversity, research, outreach and engagement, and fundraising. Each metric includes a baseline value and a target value for the end of the strategic planning period.

OSU’s practice of thoroughly renewing its strategic plan every five years ensures the plan is a living document designed to guide leadership decisions and create a sense of shared purpose for the university community. The intent is to continuously review the university’s five-year performance and progress toward its strategic goals and assess environmental conditions and emerging national and global issues and opportunities. In addition, by engaging the university community and relevant external stakeholders, the process helps the university make relevant changes and adjustments in goals and key strategic metrics and their targets. Leading the development and implementation of each strategic plan is the responsibility of the Office of the Provost. Annual progress reports are made available to the campus community and key stakeholders.
The development of the university's strategic plan informs development of strategic plans for each academic college and major administrative division of the university to ensure their priorities are aligned with institutional priorities and goals. Some plans are modeled on the university's strategic plan, and others are uniquely designed to meet the specific role and conditions of a particular college, division or unit. The college and major administrative unit plans also provide part of the formal assessment of the adequacy of resources, capacity and effectiveness of operations at the college and unit levels. These assessments are critical as OSU looks across the research and operational effectiveness of its research and human resources infrastructure and the resource needs for faculty advancement.

Annual Planning
As also described in Chapter 3, Oregon State engages in comprehensive annual planning. This uses a standard planning template to address core theme areas of the university mission — teaching, research and outreach and engagement — and highlight opportunities and challenges over the near-term horizon. Academic colleges and major administrative divisions integrate these unit-level comprehensive plans and review annual progress on strategic plan goals to create unified major unit goals. The Office of the Provost further integrates major unit plans into university-wide planning goals to determine institutional programs, budget and staffing to fulfill OSU's mission and strategic goals.

Annual planning efforts also include individual goals from executive leaders. Direct reports to the president and provost provide annual self-assessments regarding goals stated for the previous year and goals for the coming year. This final step creates alignment and cohesion between university, unit and individual goal planning.

Long-Range Forecasts: Business, Enrollment, and Capital Planning
The university takes a decade-long view to identify long-term trends in the university's finances that support or jeopardize mission fulfillment and the strategic plan. OSU's 10-Year Business Forecast provides a look far enough ahead to take corrective action or to plan for additional investments and to carefully consider the long-term impacts of current programmatic and financial decisions. The forecast considers enrollment projections; tuition rates and institutional financial aid; expense projections for inflation, benefits, salaries and enrollment growth; and new construction, renovation and repairs with associated operating and debt costs. The forecast is updated in January of even-numbered years and is available online. The current forecast will be updated for consideration by the OSU Board of Trustees in January 2020.

Financial planning is an essential component of the forecast. The process models the university's financial position, including major components related to Corvallis campus Education and General funds; OSU-Cascades Education and General funds; Statewide Public Services funds; restricted funds (including financial aid, external grants and contracts, OSU Foundation funds, etc.); auxiliary funds; and capital planning and funds. The forecast is further informed by college and divisional budget realities. The annual budget cycle is described in 3.A.4.

The Corvallis campus recently changed its approach to allocating Education and General funds to a new budget model that more clearly aligns the budget distribution for academic colleges, providing greater transparency in how resources are allocated and creating incentives aligned with mission and strategic goals. OSU-Cascades manages to a similar budget model for academic programs and administrative units.

Enrollment planning, which is critically important for the forecast, has historically included a five-year plan that outlines enrollment projections by academic college and by learner type (undergraduate, graduate, on-campus, online, hybrid, etc.). The 2012-17 plan is undergoing a major refresh to clarify the roles of
various offices and units in advancing OSU’s enrollment goals; articulate goals and tactics for OSU’s different locations and modalities; and set specific targets for 2019-20 recruiting, as well as methods for communicating those targets and tracking accountability to meet those targets. The provost has appointed a Strategic Enrollment Management Steering Committee to develop an annually updated, university-level undergraduate and graduate enrollment plan, oversee its implementation and monitor progress toward achieving the plan’s goals.

Capital planning includes management of real estate; land-use planning; design and development; and space-management needs for the university’s built environment. Under the direction of the senior associate vice president for finance and administration, the Office of Capital Planning and Development leads this effort, along with OSU leadership, academic units, and city officials. The university’s capital plan includes both short- and long-range goals to define, prioritize and plan for capital projects. These goals are rolled up into the forecast.

**Planning and Government Relations**
OSU’s Government Relations Office (GRO) monitors federal, state and regional trends in higher education and external forces impacting funding, student aid, research and outreach. The results of this monitoring inform OSU’s comprehensive planning efforts. GRO represents OSU in the governmental process by building and maintaining relationships between the university and various civic, government and political communities. The office accomplishes its goals by making certain that the OSU community is responsive to legislative requests and that in turn legislators are aware of the value Oregon receives from its investments in higher education. GRO also works closely with the Office of the Provost and the Research Office to ensure that OSU’s research, teaching and public service efforts are designed to meet the needs of all Oregonians.

**Planning and the Board of Trustees**
As noted in Chapter 2, the Board of Trustees governs the institution with a statewide presence and helps guide OSU’s mission to serve the state and the needs of its citizens in a growing global economy. Current board policies and processes, actions and resolutions, updated work plans and bylaws are posted online, along with meeting agendas and materials. The Board of Trustees meets at least four times per year and may meet more frequently as required to effectively govern the university. Meetings of the board and its committees are open to the public.

The Academic Strategies Committee (ASC) assists the Board of Trustees in its oversight of the teaching, research and public service missions of the university. The ASC’s key areas of responsibilities are:

- Assisting the board to ensure and protect, within the context of faculty shared governance, the educational quality of the university and its academic programs.
- Monitoring progress toward the university’s academic performance goals.
- Reviewing and recommending to the board the creation, merger or closure of schools, colleges or major university research centers or institutes within the university.
- Reviewing and approving major changes to the academic programs of the university, such as the creation, merger or closure of degree programs.
- Overseeing the university’s athletic programs.
- Overseeing university policies regarding student life and conduct, faculty and academic affairs.
• Overseeing the university’s research enterprise.
• Overseeing the university’s outreach and Extension Service programs.
• Overseeing engagement with accrediting bodies.

The 2019 ASC work plan includes academic briefings with each of the major areas of the academic side of the university. Each briefing uses the OSU strategic plan as the framework for the work described.
CONCLUSION
CONCLUSION

The opportunity to complete a comprehensive institution-wide self-evaluation has benefited Oregon State University in many ways. The accreditation core team and steering committee have engaged with administrators, faculty, staff, students and stakeholders to reflect upon how well OSU is meeting student achievement goals, assessing performance in student learning, stewarding resources, and fulfilling its R1 land grant mission. This self-study is an authentic assessment of OSU’s progress, successes and challenges.

The timing of the self-study could not have been better. The process to research and write the self-study report overlapped with the end of the effective period for the 2014-18 strategic plan (SP3.0) and the development of the 2019-23 plan (SP4.0). The past 18 months have been a time of reflection, learning and development of visions and plans that will ensure the best possible future for the university and the people it serves.

Oregon State University’s graduates are its most important contribution to the state of Oregon and society. OSU turns learners into leaders through degree programs offered at campuses in Corvallis and Bend, its nationally ranked Ecampus, hybrid learning pathways in Portland, as well as through community-based programming delivered via the statewide OSU Extension Service. In addition to providing access to affordable higher learning through multiple pathways, OSU is committed to delivering liberal education with a focus on critical thinking, writing, cultural understanding and service to others.

OSU faculty, students and staff are determined, collaborative and innovative in exploring new frontiers and contributing solutions to humankind’s most pressing challenges. As Oregon’s land grant and statewide university, OSU believes higher education is a public good; that an education from a research-intensive land grant university is uniquely important and should be broadly accessible and affordable; and that diversity and inclusion are essential drivers of excellence.

OSU’s success is a joint effort of many: the university’s board of trustees; its leadership; faculty, staff and students; alumni and donors; OSU Foundation and Alumni Association staff; industry, education, and community partners; and Oregon’s governor, legislators and congressional delegation. OSU believes this self-evaluation demonstrates the university is fulfilling its mission, even as it seeks to become an ever-stronger university. With the aim of continuous improvement, OSU looks forward to further evolving and refining its core themes, indicators and methods of assessing mission fulfillment in the next accreditation cycle.

Oregon State University is a special and distinct place. The university attracts faculty, staff and students who are driven to promote economic, social, cultural and environmental progress for the people of Oregon, the nation and the world. Those are not just words on paper. They are the essence of what OSU does.
APPENDICES
NWCCU REPORTS

Basic Institutional Data Forms
NWCCU REPORTS | BASIC INSTITUTIONAL DATA FORM

Information and data provided in the institutional self-evaluation are usually for the academic and fiscal year preceding the year of the evaluation committee visit. The purpose of this form is to provide Commissioners and evaluators with current data for the year of the visit. After the self-evaluation report has been finalized, complete this form to ensure the information is current for the time of the evaluation committee visit. Please provide a completed copy of this form with each copy of the self-evaluation report sent to the Commission office and to each evaluator. This form should be inserted into the appendix of the self-evaluation report (see the guidelines).

Institutional Information

Name of Institution: Oregon State University
Mailing Address: 1500 SW Jefferson Ave.
City: Corvallis
State/Province: Oregon
Zip/Postal Code: 97331
Main Phone Number: 541-737-1000
Country: United States

Chief Executive Officer
Title (Dr., Mr., Ms., etc.): Dr.
First Name: Edward
Last Name: Ray
Position (President, etc.): President
Phone: 541-737-4133
Fax: 541-737-3033
Email: ed.ray@oregonstate.edu

Accreditation Liaison Officer
Title (Dr., Mr., Ms., etc.): Dr.
First Name: Susan
Last Name: Capalbo
Position (President, etc.): Senior Vice Provost
Phone: 541-737-0732
Fax: 541-737-3033
Email: susan.capalbo@oregonstate.edu

Chief Financial Officer
Title (Dr., Mr., Ms., etc.): Mr.
First Name: Michael
Last Name: Green
Position (President, etc.): Vice President
Phone: 541-737-2447
Fax: 541-737-3033
Email: michael.green@oregonstate.edu
INSTITUTIONAL DEMOGRAPHICS

Institutional Type (Choose all that apply)

- [ ] Comprehensive
- [ ] Religious-Based
- [x] Specialized
- [ ] Native/Tribal
- [ ] Health-Centered
- [ ] Other (specify): ____________________

Degree Levels (Choose all that apply)

- [ ] Associate
- [ ] Doctorate
- [x] Baccalaureate
- [ ] If part of a multi-institution system, name of system: ____________________
- [ ] Master

Calendar Plan (Choose one that applies)

- [ ] Semester
- [ ] Trimester
- [x] Quarter
- [ ] Other (specify):
- [ ] 4-1-4

Institutional Control (Choose all that apply)

- [ ] City
- [ ] County
- [x] State
- [ ] Federal
- [ ] Tribal

- [x] Public
- [ ] Private/Independent
- [ ] Non-Profit
- [ ] For-Profit
**Students** (all locations)

**Full-Time Equivalent (FTE) Enrollment** (Formula used to compute FTE: IPEDS)

**Official Fall: 2018** (most recent year) FTE Student Enrollments

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<th>Classification</th>
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<th>One Year Prior: 2017</th>
<th>Two Years Prior: 2016</th>
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**Full-Time Unduplicated Headcount Enrollment** (Count students enrolled in credit courses only)

**Official Fall: 2018** (most recent year) Student Headcount Enrollments

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<th>Classification</th>
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<tr>
<td>Total all levels</td>
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**Faculty** (all locations)

- Numbers of Full-Time and Part-Time Instructional and Research Faculty & Staff
- Numbers of Full-Time (only) Instructional and Research Faculty & Staff by Highest Degree Earned

Include only professional personnel who are primarily assigned to instruction or research. **Total Number: 2071** Number of Full-Time (only) Faculty and Staff by Highest Degree Earned

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<th>Rank</th>
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<th>Masters</th>
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Faculty (all locations)

Mean Salaries and Mean Years of Service of Full-Time Instructional and Research Faculty and Staff.
Include only full-time personnel with professional status who are primarily assigned to instruction or research.

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<td>7.9</td>
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<tr>
<td>Undesignated Rank</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
# Statement of Cash Flows


<table>
<thead>
<tr>
<th>For the Years Ended June 30,</th>
<th>University 2018</th>
<th>University 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>(In thousands)</td>
<td></td>
</tr>
<tr>
<td><strong>Cash Flows from Operating Activities</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tuition and Fees</td>
<td>$332,545</td>
<td>$314,054</td>
</tr>
<tr>
<td>Grants and Contracts</td>
<td>$237,522</td>
<td>$230,504</td>
</tr>
<tr>
<td>Educational Department Sales and Services</td>
<td>$54,720</td>
<td>$50,960</td>
</tr>
<tr>
<td>Auxiliary Enterprise Operations</td>
<td>$170,695</td>
<td>$171,246</td>
</tr>
<tr>
<td>Payments to Employees for Compensation and Benefits</td>
<td>$(737,291)</td>
<td>$(697,330)</td>
</tr>
<tr>
<td>Payments to Suppliers</td>
<td>$(288,146)</td>
<td>$(279,522)</td>
</tr>
<tr>
<td>Student Financial Aid</td>
<td>$(38,425)</td>
<td>$(38,835)</td>
</tr>
<tr>
<td>Other Operating Receipts</td>
<td>$13,094</td>
<td>$8,960</td>
</tr>
<tr>
<td><strong>Net Cash Used by Operating Activities</strong></td>
<td>$(255,286)</td>
<td>$(239,963)</td>
</tr>
<tr>
<td><strong>Cash Flows from Noncapital Financing Activities</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Government Appropriations</td>
<td>$225,847</td>
<td>$203,295</td>
</tr>
<tr>
<td>Financial Aid Grants</td>
<td>$42,731</td>
<td>$43,177</td>
</tr>
<tr>
<td>Private Gifts Received for Endowment Purposes</td>
<td>$824</td>
<td>$179</td>
</tr>
<tr>
<td>Other Gifts and Private Contracts</td>
<td>$56,475</td>
<td>$52,591</td>
</tr>
<tr>
<td>Net Agency Fund Receipts (Payments)</td>
<td>$(332)</td>
<td>$302</td>
</tr>
<tr>
<td><strong>Net Cash Provided by Noncapital Financing Activities</strong></td>
<td>$325,545</td>
<td>$299,544</td>
</tr>
<tr>
<td><strong>Cash Flows from Capital and Related Financing Activities</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Debt Service Appropriations</td>
<td>$1,073</td>
<td>$1,084</td>
</tr>
<tr>
<td>Capital Grants and Gifts</td>
<td>$43,752</td>
<td>$58,942</td>
</tr>
<tr>
<td>Proceeds from Capital Debt</td>
<td>$124,405</td>
<td>$52,355</td>
</tr>
<tr>
<td>Sales of Capital Assets</td>
<td>$434</td>
<td>$151</td>
</tr>
<tr>
<td>Purchases of Capital Assets</td>
<td>$(113,867)</td>
<td>$(106,636)</td>
</tr>
<tr>
<td>Interest Payments on Capital Debt</td>
<td>$(21,867)</td>
<td>$(21,037)</td>
</tr>
<tr>
<td>Principal Payments on Capital Debt</td>
<td>$(21,760)</td>
<td>$(16,542)</td>
</tr>
<tr>
<td><strong>Net Cash Provided (Used) by Capital and Related Financing Activities</strong></td>
<td>$12,170</td>
<td>$(31,683)</td>
</tr>
<tr>
<td><strong>Cash Flows from Investing Activities</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Net Purchases of Investments</td>
<td>$(62,613)</td>
<td>$(6,093)</td>
</tr>
<tr>
<td>Interest Receipts on Investments and Cash Balances</td>
<td>$12,271</td>
<td>$12,032</td>
</tr>
<tr>
<td><strong>Net Cash Provided (Used) by Investing Activities</strong></td>
<td>$(50,342)</td>
<td>$5,939</td>
</tr>
<tr>
<td><strong>Net Increase in Cash and Cash Equivalents</strong></td>
<td>$32,087</td>
<td>$33,837</td>
</tr>
<tr>
<td><strong>Cash and Cash Equivalents</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Beginning Balance</td>
<td>$89,550</td>
<td>$55,713</td>
</tr>
<tr>
<td>Ending Balance</td>
<td>$121,637</td>
<td>$89,550</td>
</tr>
</tbody>
</table>

The accompanying notes are an integral part of these financial statements.

338 NWCCU Self-Evaluation Report | 2019
<table>
<thead>
<tr>
<th>RECONCILIATION OF OPERATING LOSS TO NET CASH USED BY OPERATING ACTIVITIES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Operating Loss</td>
</tr>
</tbody>
</table>
| Adjustments to Reconcile Operating Loss to Net Cash Used by Operating Activities:
  | Depreciation Expense | 56,493 | 54,757 |
| Changes in Assets and Liabilities:
  | Accounts Receivable | (3,462) | 4,774 |
  | Notes Receivable | (2,212) | (1,044) |
  | Inventories | 12 | 167 |
  | Prepaid Expenses | (2,739) | 1,885 |
  | Net Pension Liability and Related Deferrals | 36,425 | 40,372 |
  | OPEB Asset/(Liability) and Related Deferrals | (1,088) |
  | Accounts Payable and Accrued Liabilities | 17,782 | (12,436) |
  | Long-Term Liabilities | (608) | (753) |
  | Unearned Revenues | 5,641 | 4,360 |
| NET CASH USED BY OPERATING ACTIVITIES | $ (255,286) | $ (239,963) |

<table>
<thead>
<tr>
<th>NONCASH INVESTING, NONCAPITAL FINANCING, AND CAPITAL RELATED FINANCING TRANSACTIONS AND</th>
</tr>
</thead>
<tbody>
<tr>
<td>Capital Assets Acquired by Gifts-in-Kind</td>
</tr>
<tr>
<td>Increase (Decrease) in Fair Value of Investments Recognized as a Component of Investment Activity</td>
</tr>
<tr>
<td>Capital Assets Acquired by Accounts Payable</td>
</tr>
</tbody>
</table>

The accompanying notes are an integral part of these financial statements.
### University Financial Statements

For the Years Ended June 30, 2017 and 2016

#### CASH FLOWS FROM OPERATING ACTIVITIES

<table>
<thead>
<tr>
<th>Description</th>
<th>2017</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tuition and Fees</td>
<td>$314,054</td>
<td>$310,418</td>
</tr>
<tr>
<td>Grants and Contracts</td>
<td>230,504</td>
<td>202,709</td>
</tr>
<tr>
<td>Educational Department Sales and Services</td>
<td>50,960</td>
<td>46,651</td>
</tr>
<tr>
<td>Auxiliary Enterprise Operations</td>
<td>171,246</td>
<td>154,077</td>
</tr>
<tr>
<td>Payments to Employees for Compensation and Benefits</td>
<td>(697,330)</td>
<td>(654,630)</td>
</tr>
<tr>
<td>Payments to Suppliers</td>
<td>(279,522)</td>
<td>(254,594)</td>
</tr>
<tr>
<td>Student Financial Aid</td>
<td>(38,835)</td>
<td>(40,162)</td>
</tr>
<tr>
<td>Other Operating Receipts</td>
<td>8,960</td>
<td>186</td>
</tr>
<tr>
<td><strong>Net Cash Used by Operating Activities</strong></td>
<td>(239,963)</td>
<td>(235,345)</td>
</tr>
</tbody>
</table>

#### CASH FLOWS FROM NONCAPITAL FINANCING ACTIVITIES

<table>
<thead>
<tr>
<th>Description</th>
<th>2017</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Government Appropriations</td>
<td>203,295</td>
<td>193,377</td>
</tr>
<tr>
<td>Financial Aid Grants</td>
<td>43,177</td>
<td>47,093</td>
</tr>
<tr>
<td>Private Gifts Received for Endowment Purposes</td>
<td>179</td>
<td>129</td>
</tr>
<tr>
<td>Other Gifts and Private Contracts</td>
<td>52,591</td>
<td>53,751</td>
</tr>
<tr>
<td>Net Agency Fund Receipts (Payments)</td>
<td>302</td>
<td>(799)</td>
</tr>
<tr>
<td><strong>Net Cash Provided by Noncapital Financing Activities</strong></td>
<td>299,544</td>
<td>293,551</td>
</tr>
</tbody>
</table>

#### CASH FLOWS FROM CAPITAL AND RELATED FINANCING ACTIVITIES

<table>
<thead>
<tr>
<th>Description</th>
<th>2017</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Debt Service Appropriations</td>
<td>1,084</td>
<td>1,084</td>
</tr>
<tr>
<td>Capital Grants and Gifts</td>
<td>58,942</td>
<td>82,816</td>
</tr>
<tr>
<td>Bond Proceeds from Capital Debt</td>
<td>52,355</td>
<td>260</td>
</tr>
<tr>
<td>Sales of Capital Assets</td>
<td>151</td>
<td>1,306</td>
</tr>
<tr>
<td>Purchases of Capital Assets</td>
<td>(106,636)</td>
<td>(146,162)</td>
</tr>
<tr>
<td>Interest Payments on Capital Debt</td>
<td>(21,037)</td>
<td>(19,729)</td>
</tr>
<tr>
<td>Principal Payments on Capital Debt</td>
<td>(16,542)</td>
<td>(16,882)</td>
</tr>
<tr>
<td><strong>Net Cash Used by Capital and Related Financing Activities</strong></td>
<td>(31,683)</td>
<td>(97,307)</td>
</tr>
</tbody>
</table>

#### CASH FLOWS FROM INVESTING ACTIVITIES

<table>
<thead>
<tr>
<th>Description</th>
<th>2017</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Net Purchases of Investments</td>
<td>(6,093)</td>
<td>(15,270)</td>
</tr>
<tr>
<td>Interest Receipts on Investments and Cash Balances</td>
<td>12,032</td>
<td>12,257</td>
</tr>
<tr>
<td><strong>Net Cash Provided (Used) by Investing Activities</strong></td>
<td>5,939</td>
<td>(3,013)</td>
</tr>
<tr>
<td><strong>Net Increase (Decrease) in Cash and Cash Equivalents</strong></td>
<td>33,837</td>
<td>(42,114)</td>
</tr>
</tbody>
</table>

#### CASH AND CASH EQUIVALENTS

<table>
<thead>
<tr>
<th>Description</th>
<th>2017</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beginning Balance</td>
<td>55,713</td>
<td>97,827</td>
</tr>
<tr>
<td><strong>Ending Balance</strong></td>
<td>$89,550</td>
<td>$55,713</td>
</tr>
</tbody>
</table>

The accompanying notes are an integral part of these financial statements.
RECONCILIATION OF OPERATING LOSS TO NET CASH USED BY OPERATING ACTIVITIES

<table>
<thead>
<tr>
<th></th>
<th>2017</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Operating Loss</td>
<td>$(332,045)</td>
<td>$(372,602)</td>
</tr>
<tr>
<td>Adjustments to Reconcile Operating Loss to Net Cash Used by Operating Activities:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Depreciation Expense</td>
<td>54,757</td>
<td>50,520</td>
</tr>
<tr>
<td>Changes in Assets and Liabilities:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accounts Receivable</td>
<td>4,774</td>
<td>(16,711)</td>
</tr>
<tr>
<td>Notes Receivable</td>
<td>(1,044)</td>
<td>1,793</td>
</tr>
<tr>
<td>Inventories</td>
<td>167</td>
<td>(10)</td>
</tr>
<tr>
<td>Prepaid Expenses</td>
<td>1,885</td>
<td>(3,705)</td>
</tr>
<tr>
<td>Pension Expense Changes Related to Net Pension Asset</td>
<td>40,124</td>
<td>93,201</td>
</tr>
<tr>
<td>Accounts Payable and Accrued Liabilities</td>
<td>(12,436)</td>
<td>6,361</td>
</tr>
<tr>
<td>Long-Term Liabilities</td>
<td>(505)</td>
<td>(2,571)</td>
</tr>
<tr>
<td>Unearned Revenues</td>
<td>4,360</td>
<td>8,379</td>
</tr>
<tr>
<td><strong>NET CASH USED BY OPERATING ACTIVITIES</strong></td>
<td><strong>$(239,963)</strong></td>
<td><strong>$(235,345)</strong></td>
</tr>
</tbody>
</table>

NONCASH INVESTING, NONCAPITAL FINANCING, AND CAPITAL AND RELATED FINANCING TRANSACTIONS

<table>
<thead>
<tr>
<th></th>
<th>2017</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Capital Assets Acquired by Gifts-in-Kind</td>
<td>$1,644</td>
<td>$1,016</td>
</tr>
<tr>
<td>Increase (Decrease) in Fair Value of Investments Recognized as a Component of Investment Activity</td>
<td>768</td>
<td>(332)</td>
</tr>
<tr>
<td>Removal of State Paid Debt</td>
<td>-2</td>
<td>1,352</td>
</tr>
<tr>
<td>Capital Assets Acquired by Accounts Payable</td>
<td>2,028</td>
<td>-</td>
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</tbody>
</table>

The accompanying notes are an integral part of these financial statements.
## BALANCE SHEET


<table>
<thead>
<tr>
<th>University</th>
<th>2018</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>(In thousands)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### ASSETS

#### Current Assets

<table>
<thead>
<tr>
<th></th>
<th>2018</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash and Cash Equivalents (Note 2)</td>
<td>$78,461</td>
<td>$62,997</td>
</tr>
<tr>
<td>Collateral from Securities Lending (Note 2)</td>
<td>13,510</td>
<td>5,988</td>
</tr>
<tr>
<td>Accounts Receivable, Net (Note 3)</td>
<td>123,599</td>
<td>114,861</td>
</tr>
<tr>
<td>Notes Receivable, Net (Note 4)</td>
<td>4,548</td>
<td>4,469</td>
</tr>
<tr>
<td>Inventories</td>
<td>1,746</td>
<td>1,758</td>
</tr>
<tr>
<td>Prepaid Expenses</td>
<td>8,893</td>
<td>6,154</td>
</tr>
<tr>
<td><strong>Total Current Assets</strong></td>
<td><strong>230,757</strong></td>
<td><strong>196,227</strong></td>
</tr>
</tbody>
</table>

#### Noncurrent Assets

<table>
<thead>
<tr>
<th></th>
<th>2018</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash and Cash Equivalents (Note 2)</td>
<td>43,176</td>
<td>26,553</td>
</tr>
<tr>
<td>Investments (Note 2)</td>
<td>247,248</td>
<td>184,643</td>
</tr>
<tr>
<td>Notes Receivable, Net (Note 4)</td>
<td>20,656</td>
<td>18,523</td>
</tr>
<tr>
<td>Net OPEB Asset (Note 16)</td>
<td>1,027</td>
<td>-</td>
</tr>
<tr>
<td>Capital Assets, Net of Accumulated Depreciation (Note 5)</td>
<td>1,182,980</td>
<td>1,126,879</td>
</tr>
<tr>
<td><strong>Total Noncurrent Assets</strong></td>
<td><strong>1,495,087</strong></td>
<td><strong>1,356,598</strong></td>
</tr>
</tbody>
</table>

**Total Assets**

<table>
<thead>
<tr>
<th>2018</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>$1,725,844</td>
<td>$1,552,825</td>
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</table>

### LIABILITIES

#### Current Liabilities

<table>
<thead>
<tr>
<th></th>
<th>2018</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounts Payable and Accrued Liabilities (Note 7)</td>
<td>$88,557</td>
<td>$72,758</td>
</tr>
<tr>
<td>Deposits</td>
<td>1,704</td>
<td>2,036</td>
</tr>
<tr>
<td>Obligations Under Securities Lending (Note 2)</td>
<td>13,510</td>
<td>5,988</td>
</tr>
<tr>
<td>Current Portion of Long-Term Liabilities (Note 9)</td>
<td>46,896</td>
<td>42,021</td>
</tr>
<tr>
<td>Unearned Revenues</td>
<td>62,693</td>
<td>57,052</td>
</tr>
<tr>
<td><strong>Total Current Liabilities</strong></td>
<td><strong>213,360</strong></td>
<td><strong>179,855</strong></td>
</tr>
</tbody>
</table>

#### Noncurrent Liabilities

<table>
<thead>
<tr>
<th></th>
<th>2018</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Long-Term Liabilities (Note 9)</td>
<td>576,074</td>
<td>457,227</td>
</tr>
<tr>
<td>Net Pension Liability (Note 15)</td>
<td>293,881</td>
<td>322,538</td>
</tr>
<tr>
<td>OPEB Liability (Note 16)</td>
<td>18,960</td>
<td>6,949</td>
</tr>
<tr>
<td><strong>Total Noncurrent Liabilities</strong></td>
<td><strong>888,915</strong></td>
<td><strong>786,714</strong></td>
</tr>
</tbody>
</table>

**Total Liabilities**

<table>
<thead>
<tr>
<th>2018</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>$1,102,275</td>
<td>$966,569</td>
</tr>
</tbody>
</table>

#### DEFERRED INFLOWS OF RESOURCES (Note 6)

<table>
<thead>
<tr>
<th>2018</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>$7,202</td>
<td>$3,068</td>
</tr>
</tbody>
</table>
### NET POSITION

<table>
<thead>
<tr>
<th>Item</th>
<th>2017</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Net Investment in Capital Assets</td>
<td>$711,200</td>
<td>$705,793</td>
</tr>
<tr>
<td>Restricted For:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nonexpendable Endowments</td>
<td>5,960</td>
<td>5,135</td>
</tr>
<tr>
<td>Expendable:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gifts, Grants and Contracts</td>
<td>49,698</td>
<td>46,121</td>
</tr>
<tr>
<td>Student Loans</td>
<td>10,091</td>
<td>32,253</td>
</tr>
<tr>
<td>Capital Projects</td>
<td>5,963</td>
<td>5,708</td>
</tr>
<tr>
<td>Debt Service</td>
<td>1,996</td>
<td>2,652</td>
</tr>
<tr>
<td>OPEB Asset</td>
<td>1,027</td>
<td>-</td>
</tr>
<tr>
<td>Unrestricted (Note 10)</td>
<td>(57,995)</td>
<td>(43,475)</td>
</tr>
<tr>
<td><strong>Total Net Position</strong></td>
<td>$727,940</td>
<td>$754,187</td>
</tr>
</tbody>
</table>

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### ASSETS

#### University

<table>
<thead>
<tr>
<th>As of June 30,</th>
<th>2017</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>(In thousands)</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>ASSETS</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Current Assets</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cash and Cash Equivalents (Note 2)</td>
<td>$62,997</td>
<td>$47,697</td>
</tr>
<tr>
<td>Collateral from Securities Lending (Note 2)</td>
<td>5,988</td>
<td>7,247</td>
</tr>
<tr>
<td>Accounts Receivable, Net (Note 3)</td>
<td>114,861</td>
<td>131,590</td>
</tr>
<tr>
<td>Notes Receivable, Net (Note 4)</td>
<td>4,469</td>
<td>4,045</td>
</tr>
<tr>
<td>Inventories</td>
<td>1,758</td>
<td>1,925</td>
</tr>
<tr>
<td>Prepaid Expenses</td>
<td>6,154</td>
<td>8,039</td>
</tr>
<tr>
<td><strong>Total Current Assets</strong></td>
<td><strong>196,227</strong></td>
<td><strong>200,543</strong></td>
</tr>
<tr>
<td><strong>Noncurrent Assets</strong></td>
<td></td>
<td></td>
</tr>
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<td>Cash and Cash Equivalents (Note 2)</td>
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<tr>
<td>Investments (Note 2)</td>
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<td>Notes Receivable, Net (Note 4)</td>
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<td>Capital Assets, Net of Accumulated Depreciation (Note 5)</td>
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<td><strong>Total Noncurrent Assets</strong></td>
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<td><strong>1,275,306</strong></td>
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<tr>
<td><strong>Total Assets</strong></td>
<td><strong>$1,552,825</strong></td>
<td><strong>$1,475,849</strong></td>
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<td><strong>DEFERRED OUTFLOWS OF RESOURCES</strong> (Note 6)</td>
<td><strong>$170,999</strong></td>
<td><strong>$28,203</strong></td>
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### LIABILITIES

**Current Liabilities**

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<th>Description</th>
<th>2019</th>
<th>2018</th>
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<tbody>
<tr>
<td>Accounts Payable and Accrued Liabilities (Note 7)</td>
<td>$ 88,557</td>
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<td>Deposits</td>
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**Total Current Liabilities**

|                                                        | 213,360       | 179,855       |

**Noncurrent Liabilities**

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<td>Long-Term Liabilities (Note 9)</td>
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<td>Net Pension Liability (Note 15)</td>
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<td>322,538</td>
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**Total Noncurrent Liabilities**

|                                                        | 888,915       | 786,714       |

**Total Liabilities**

|                                                        | $ 1,102,275   | $ 966,569     |

**Deferred Inflows of Resources (Note 6)**

|                                                        | $ 7,202       | $ 3,068       |

### NET POSITION

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<td>Expendable:</td>
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<td>Unrestricted (Note 10)</td>
<td>(43,475)</td>
<td>(24,831)</td>
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**Total Net Position**

|                                                        | $ 754,187     | $ 741,277     |

The accompanying notes are an integral part of these financial statements.
# OPERATING BUDGET

Operating Budget from Oregon State University Board Approved Budgets Fiscal Year 2018 and 2017 (including FY 2016 information).

## Budgeted Operations by Unit*
Fiscal Year 2018 Initial Expenditure Budget

<table>
<thead>
<tr>
<th></th>
<th>OSU Corvallis Ed &amp; General</th>
<th>OSU Cascades Ed &amp; General</th>
<th>Agricultural Experiment Station</th>
<th>OSU Extension Service</th>
<th>Forest Research Laboratory</th>
<th>Auxiliary Enterprise</th>
<th>Service Departments</th>
<th>Designated Operations</th>
<th>Royalties</th>
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*Fiscal Year 2018 Initial Expenditure Budget*
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<thead>
<tr>
<th></th>
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<tbody>
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<td>Agricultural Sciences</td>
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*Capital Budget - see p. 46
## Budgeted Operations by Unit*
### Fiscal Year 2017 Initial Expenditure Budget

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<th>OSU Corvallis Ed &amp; General</th>
<th>OSU Cascades Ed &amp; General</th>
<th>Agricultural Experiment Station</th>
<th>OSU Extension Service</th>
<th>Forest Research Laboratory</th>
<th>Auxiliary Enterprise</th>
<th>Service Departments</th>
<th>Designated Operations</th>
<th>Royalties</th>
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<tbody>
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*Units indicated by italics indicate a portion of the combined operational units in that unit.*
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*Capital Budget — see page 349
## Budgeted Operations by Unit*

**Fiscal Year 2016 Initial Expenditure Budget**

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<thead>
<tr>
<th>Unit</th>
<th>Executive Office</th>
<th>University Relations &amp; Marketing</th>
<th>Provost Pass Through</th>
<th>Enrollment Management</th>
<th>Undergraduate Studies</th>
<th>Academic Affairs</th>
<th>University Libraries</th>
<th>Information Services</th>
<th>Graduate School</th>
<th>Extended Campus</th>
<th>Summer Session</th>
<th>Outreach &amp; Engagement</th>
<th>OSU Extension Service</th>
<th>Research Admin &amp; Research Ctrs</th>
<th>Student Affairs</th>
<th>International Programs</th>
<th>University Honors College</th>
<th>Cascades Campus</th>
<th>Agricultural Sciences</th>
<th>Veterinary Medicine</th>
<th>Forestry</th>
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*Note: The table lists budgeted operations by unit for Fiscal Year 2016 Initial Expenditure Budget at Oregon State University, including various departments and units with their respective budget allocations.*
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<tr>
<th>Department</th>
<th>Budget</th>
<th>Growth</th>
<th>Employment</th>
<th>Facilities</th>
<th>Technology</th>
<th>Research</th>
<th>Total</th>
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<td>-3%</td>
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<td>150,000</td>
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<td>$9,351,213</td>
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<td>$20,327,225</td>
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# CAPITAL BUDGET

## Capital Budget from Oregon State University Board Approved Capital Budget Fiscal Year 2018 and 2017 (including FY 2016 information)

### Capital Budget - Major Projects, >$5 million

#### Fiscal Year 2018

<table>
<thead>
<tr>
<th>Project Name</th>
<th>Total Authorization</th>
<th>Spent as of FY 2017</th>
<th>FY 2018 Budget</th>
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<tbody>
<tr>
<td>Jefferson St Utility Tunnel</td>
<td>$8,663,000</td>
<td>$718,953</td>
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<td>Newport Student Housing</td>
<td>$27,180,000</td>
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<td>HMSC Marine Study Bldg</td>
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<td>Forestry Science Complex</td>
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<td><strong>Total</strong></td>
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#### Fiscal Year 2017

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<tr>
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<td>Learning Innovation Center</td>
<td>$65,000,000</td>
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<td>Forestry Science Complex</td>
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<tr>
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<td>$2,412,000</td>
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<tr>
<td>OSU-C Academic Building</td>
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<td>$14,504,245</td>
<td>$7,149,755</td>
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<tr>
<td>OSU-C Residential and Dining/Academic</td>
<td>$42,000,000</td>
<td>$19,196,061</td>
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<tr>
<td>Strand Ag Hall Remodel</td>
<td>$24,870,000</td>
<td>$23,827,532</td>
<td>$1,042,468</td>
</tr>
<tr>
<td>Project</td>
<td>Total Authorization</td>
<td>Spent as of FY 2016</td>
<td>FY 2078 Budget</td>
</tr>
<tr>
<td>----------------------------------------------</td>
<td>---------------------</td>
<td>---------------------</td>
<td>----------------</td>
</tr>
<tr>
<td>Valley Football Center</td>
<td>$42,000,000</td>
<td>$21,136,209</td>
<td>$22,448,200</td>
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<tr>
<td>Nypro &amp; Cascade Remodel</td>
<td>$6,125,000</td>
<td>$5,714,752</td>
<td>$410,248</td>
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<tr>
<td>Student comm. Center-Azalea &amp; Avery</td>
<td>$5,400,000</td>
<td>4,625,073</td>
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<td><strong>$357,049,000</strong></td>
<td><strong>$185,870,188</strong></td>
<td><strong>$108,816,584</strong></td>
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**Capital Budget - Major Projects, >$5 million**

Fiscal Year 2016

<table>
<thead>
<tr>
<th>Project</th>
<th>Total Authorization</th>
<th>Spent as of FY 2016</th>
<th>FY 2078 Budget</th>
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<tbody>
<tr>
<td>Engineering Bldg. (Johnson Hall)</td>
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<td>Forestry Science Complex</td>
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<td>Marine Studies Initiative</td>
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<td>$2,500,000</td>
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<tr>
<td>OSU-C Academic Building</td>
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<td>$2,294,532</td>
<td>$15,505,468</td>
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<td>OSU-C Residential and Dining/Academic</td>
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<td>$</td>
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<td>Strand Ag Hall Remodel</td>
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<td>$793,992</td>
<td>$4,200,000</td>
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<td><strong>Total</strong></td>
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<td><strong>$93,285,542</strong></td>
<td><strong>$127,769,973</strong></td>
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# Revenue Projections

Revenue Projections from Oregon State University Budget Office: Fiscal Year 2018 and 2017 (including FY 2016 information).

## FY2018 Revenue Detail (Final)

<table>
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<th></th>
<th>Distributed Resources</th>
<th>Departmental Resources</th>
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<tbody>
<tr>
<td><strong>Public University Support Fund</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Outcomes Funding Allocation</td>
<td>$54,759,087</td>
<td>$-</td>
<td>$54,759,087</td>
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<td>SCH Funding Allocation</td>
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<td>38,671,904</td>
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<td>Tuition Buydown Phase #2</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Stop Loss/Stop Gain</td>
<td>(127,507)</td>
<td>-</td>
<td>(127,507)</td>
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<td></td>
<td></td>
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<tr>
<td>Research Support</td>
<td>2,877,182</td>
<td>-</td>
<td>2,877,182</td>
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<tr>
<td><strong>Mission Support</strong></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Pharmacy Differential</td>
<td>-</td>
<td>1,098,365</td>
<td>1,098,365</td>
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<tr>
<td>Vet Diagnostic Lab</td>
<td>-</td>
<td>1,301,044</td>
<td>1,301,044</td>
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<tr>
<td>SWPS Building Maintenance</td>
<td>1,893,951</td>
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<td>1,893,951</td>
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<tr>
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<td><strong>Systemwide Expenses/Programs</strong></td>
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<td>-</td>
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<td>47,475</td>
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<td>Faculty Diversity</td>
<td>59,512</td>
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<td>59,512</td>
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<td>Services to Students with Disabilities</td>
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<td>70,448</td>
<td>70,448</td>
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<tr>
<td><strong>Subtotal - Public University Support Fund</strong></td>
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<td>8,085,402</td>
<td>107,338,862</td>
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<tr>
<td><strong>State Programs Funding</strong></td>
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<tr>
<td>Engineering - ETIC</td>
<td>-</td>
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<td>7,041,395</td>
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<tr>
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<td>-</td>
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<td>635,855</td>
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<td>Signature Research Centers</td>
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<td>253,538</td>
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<tr>
<td>Ocean Vessels Research</td>
<td>-</td>
<td>317,929</td>
<td>317,929</td>
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<tr>
<td>Natural Resource Institute</td>
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<td>204,720</td>
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<tr>
<td>Oregon Climate Change Research Institute</td>
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<td>160,470</td>
<td>160,470</td>
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<td>OSU-UO TallWood Design Institute</td>
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<td>1,743,717</td>
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<td>Molluscan Brood Stock</td>
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<td>279,300</td>
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<tr>
<td>Ocean Acidification</td>
<td>-</td>
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<td>137,200</td>
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<td><strong>Total - State Programs Funding</strong></td>
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<tr>
<td>OSU - Corvallis</td>
<td>291,386,330</td>
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<td>291,386,330</td>
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<tr>
<td>Extended Campus</td>
<td>96,230,763</td>
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<td>96,230,763</td>
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<tr>
<td>Summer Term</td>
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<td>11,377,900</td>
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<td><strong>Subtotal - Tuition</strong></td>
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<td>-</td>
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<tr>
<td><strong>Tuition Waivers</strong></td>
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<td>-</td>
<td>(38,496,686)</td>
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### Student Fees

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<th>Resource Fees</th>
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<th>3,290,139</th>
<th>3,290,139</th>
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<tr>
<td>Other Student Fees</td>
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<td><strong>Subtotal - Student Fees</strong></td>
<td>-</td>
<td><strong>11,436,787</strong></td>
<td><strong>11,436,787</strong></td>
</tr>
</tbody>
</table>

### Other Resources

| Indirect Cost Recovery / Returned Overhead Bldg Use Crdts & Audit Disallowed Portion | - | 41,200,000 | 41,200,000 |
| Indirect Cost Recovery | - | (1,648,000) | (1,648,000) |
| Sales & Services / Misc Income | 600,000 | 17,141,817 | 17,741,817 |
| Interest Revenue | 4,399,710 | - | 4,399,710 |
| Debt Service Support on SELP Loans | 1,084,152 | - | 1,084,152 |
| **Subtotal - Other Resources** | **6,083,862** | **56,693,817** | **62,777,679** |

| **Total Revenue** | **$465,835,629** | **$86,990,130** | **$5552,825,759** |
## FY2017 Revenue Budget Detail Total

<table>
<thead>
<tr>
<th>FY2017 Revenue Budget Detail Total</th>
<th>Distributed Resources</th>
<th>Departmental Resources</th>
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<tbody>
<tr>
<td><strong>Public University Support Fund</strong></td>
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<td></td>
<td></td>
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<tr>
<td>Outcomes Funding Allocation</td>
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<td>$ 30,957,042</td>
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<td>SCH Funding Allocation</td>
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<td>48,733,028</td>
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<td>Tuition Buydown Phase #2</td>
<td>6,690,759</td>
<td>-</td>
<td>6,690,759</td>
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<tr>
<td>Stop Loss/Stop Gain</td>
<td>(110,292)</td>
<td>-</td>
<td>(110,292)</td>
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<tr>
<td><strong>Mission Differentiation Funds</strong></td>
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<td></td>
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</tr>
<tr>
<td>Research Support</td>
<td>2,837,557</td>
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<td>2,837,557</td>
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<tr>
<td><strong>Mission Support</strong></td>
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<td></td>
<td></td>
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<tr>
<td>Pharmacy Differential</td>
<td>-</td>
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<td>Vet Med Differential</td>
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<td>Vet Diagnostic Lab</td>
<td>-</td>
<td>1,283,125</td>
<td>1,283,125</td>
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<tr>
<td>SWPS Building Maintenance</td>
<td>1,867,866</td>
<td>-</td>
<td>1,867,866</td>
</tr>
<tr>
<td>Engineering Graduate Support</td>
<td>2,313,528</td>
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<td>2,313,528</td>
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<tr>
<td><strong>Systemwide Expenses/Programs</strong></td>
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<tr>
<td>Endowment Match</td>
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<tr>
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<td>58,692</td>
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<td>$100,087,498</td>
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<tr>
<td><strong>State Programs Funding</strong></td>
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<tr>
<td>Engineering - ETIC</td>
<td>-</td>
<td>7,041,395</td>
<td>7,041,395</td>
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<tr>
<td>Fermentation Science</td>
<td>-</td>
<td>632,196</td>
<td>632,196</td>
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<tr>
<td>Signature Research Centers</td>
<td>-</td>
<td>252,079</td>
<td>252,079</td>
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<tr>
<td>Ocean Vessels Research</td>
<td>-</td>
<td>316,099</td>
<td>316,099</td>
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<tr>
<td>Natural Resource Institute</td>
<td>-</td>
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<td>203,543</td>
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<tr>
<td>Oregon Climate Change Research Institute</td>
<td>-</td>
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<td>159,547</td>
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<td>1,275,000</td>
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<tr>
<td>OSU Shellfish Research (one-time)</td>
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<td>OSU INR Task Force Support (one-time)</td>
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<td><strong>Total - State Programs Funding</strong></td>
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<td><strong>Subtotal State Appropriation</strong></td>
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### Tuition

<table>
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<tr>
<th>Tuition</th>
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<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td>OSU - Corvallis</td>
<td>281,421,914</td>
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<td>281,421,914</td>
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<tr>
<td>Extended Campus</td>
<td>76,887,731</td>
<td>-</td>
<td>76,887,731</td>
</tr>
<tr>
<td>Summer Term</td>
<td>10,252,931</td>
<td>-</td>
<td>10,252,931</td>
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<tr>
<td><strong>Subtotal - Tuition</strong></td>
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<td><strong>368,562,576</strong></td>
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### Tuition Waivers

<table>
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<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>(35,437,438)</td>
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<td>-</td>
<td>(35,437,438)</td>
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</table>

### Student Fees

<table>
<thead>
<tr>
<th>Student Fees</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Resource Fees</td>
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<tr>
<td>Other Student Fees</td>
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<td><strong>Subtotal - Student Fees</strong></td>
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OREGON STATE UNIVERSITY 355
### Other Resources

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<tr>
<th>Description</th>
<th>FY19</th>
<th>FY20</th>
<th>FY21</th>
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</thead>
<tbody>
<tr>
<td>Indirect Cost Recovery / Returned Overhead</td>
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<tr>
<td>Bldg Use Crdts &amp; Audit Disallowed Portion of Indirect Cost Recovery</td>
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<td>(1,580,000)</td>
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<tr>
<td>Sales &amp; Services / Misc Income</td>
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<td>17,771,094</td>
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<tr>
<td>Interest Revenue</td>
<td>3,200,000</td>
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<td>3,200,000</td>
</tr>
<tr>
<td>Debt Service Support on SELP Loans</td>
<td>1,084,152</td>
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<td>1,084,152</td>
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<tr>
<td><strong>Subtotal - Other Resources</strong></td>
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<td><strong>55,691,094</strong></td>
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<td><strong>Total Revenue</strong></td>
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<td><strong>$85,388,705</strong></td>
<td><strong>$514,885,246</strong></td>
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## FY2016 Revenue Detail (Final)

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<tr>
<th>Public University Support Fund</th>
<th>Budget</th>
<th>Actual</th>
</tr>
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<tbody>
<tr>
<td>Outcomes Funding Allocation</td>
<td>$14,643,558</td>
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<tr>
<td>SCH Funding Allocation</td>
<td>60,561,657</td>
<td>61,062,649</td>
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<tr>
<td>Tuition Buydown Phase #2</td>
<td>6,572,645</td>
<td>6,690,760</td>
</tr>
<tr>
<td>Stop Loss/Stop Gain</td>
<td>596,292</td>
<td>411,342</td>
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<tr>
<td>Mission Differentiation Funds</td>
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<tr>
<td>Research Support</td>
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<td>2,773,760</td>
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<tr>
<td>Mission Support</td>
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<tr>
<td>Pharmacy Differential</td>
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<tr>
<td>Vet Med Differential</td>
<td>3,533,941</td>
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<tr>
<td>Vet Diagnostic Lab</td>
<td>1,254,277</td>
<td>1,254,277</td>
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<tr>
<td>SWPS Building Maintenance</td>
<td>1,825,871</td>
<td>1,825,871</td>
</tr>
<tr>
<td>Engineering Graduate Support</td>
<td>2,319,214</td>
<td>2,261,513</td>
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<tr>
<td>Systemwide Expenses/Programs</td>
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<td>Endowment Match</td>
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<tr>
<td>Orbis</td>
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<td>45,768</td>
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<tr>
<td>Faculty Diversity</td>
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<tr>
<td>Services to Students with Disabilities</td>
<td>67,916</td>
<td>67,916</td>
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<tr>
<td><strong>Subtotal - Public University Support Fund</strong></td>
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<td><strong>96,324,305</strong></td>
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<table>
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<tr>
<th>State Programs Funding</th>
<th>Budget</th>
<th>Actual</th>
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</thead>
<tbody>
<tr>
<td>Engineering - ETIC</td>
<td>7,041,394</td>
<td>7,041,394</td>
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<td>Oregon Climate Change Research Institute</td>
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### Other Resources

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## SUBSTANTIVE CHANGES

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## Domestic Off-Campus Degree Programs and Academic Credit Sites

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<th>Name of Site</th>
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Commonly Used Acronyms
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<td>UPSM</td>
<td>University Policies and Standards/University Policies and Standards Manual</td>
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APPENDIX 2.C.5A

Summary of Undergraduate Academic Program Reviews
<table>
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<tr>
<th>Program</th>
<th>Department or School/ College</th>
<th>Degree Type</th>
<th>Review Site Visit Schedule: Previous/Next</th>
<th>Review Type</th>
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<td>2012/2022</td>
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</table>

**Accreditation** = Program review conducted through an accrediting body such as ABET.

**UAPR** = Undergraduate Academic Program Review includes the program's degrees, minors, options and certificates at all OSU campuses through a process involving a site visit and external reviewers.

**New** = New programs are reviewed through an internal process five years after implementation and then reviewed through an external process with a site visit 10 years after implementation.

**Note:** Stand-alone undergraduate certificates are reviewed through a process similar to the five-year review of new programs.

**Reference (OSU Undergraduate Degrees as of 2018):** [catalog.oregonstate.edu/programs/#filter=.filter_19&filter_39](catalog.oregonstate.edu/programs/#filter=.filter_19&filter_39)
APPENDIX 2.C.5B
Summary of Graduate Academic Program Reviews
<table>
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<th>Visit Schedule: Previous/Next</th>
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<td>Wood Science</td>
<td>Forestry</td>
<td>MS, PhD</td>
<td>2014/2024</td>
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APPENDIX: 3.A.1.
Profiles of Colleges and Administrative Units
COLLEGE OF AGRICULTURAL SCIENCES

Leadership
Alan Sams, Dean
Bill Boggess, Executive Associate Dean
Dan Edge, Associate Dean
Joyce Loper, Associate Dean
Penny Diebel, Assistant Dean for Academic Programs
Sam Angima, Assistant Dean for Outreach and Engagement; Extension Program Leader
John Talbott, Assistant Director, Oregon Agricultural Experiment Station
Ricardo Mata Gonzales, Interim Head, Department of Animal and Rangeland Sciences
Joey Spatafora, Head, Department of Botany and Plant Pathology
Jennifer Alix-Garcia, Head, Department of Applied Economics
Jonathan Velez, Interim Head, Department of Agricultural Education and Agricultural Sciences
John Bolte, Head, Department of Biological and Ecological Engineering
Jay Noller, Head, Department of Crop and Soil Sciences
Craig Marcus, Head, Department of Environmental and Molecular Toxicology
Selina Heppell, Head, Department of Fisheries and Wildlife
Robert McGorrin, Head, Department of Food Science and Technology
Bill Braunworth, Head, Department of Horticulture
Jerri Bartholomew, Head, Department of Microbiology

College Summary

Mission
The College of Agricultural Sciences is a world-class leader in agricultural, environmental and life sciences. The college develops leadership and science-based expertise in its students and creates knowledge to solve problems, manage natural resources, create jobs and support the economy.

Academics within the College of Agricultural Sciences prepare the next generation of scientists, managers and leaders in the fields of food, agriculture, natural resources and life sciences. With 14 academic programs, learning is integrated with research and the OSU Extension Service to provide students with inquiry-based, hands-on experiences in laboratories and field locations across Oregon and around the world.

The Oregon Agricultural Experiment Station (AES) is Oregon’s principal research engine related to agriculture and natural resources. Centered in the College of Agricultural Sciences, AES engages more than 400 scientists in five OSU colleges, on campus and at branch stations across the state. The strengths of all these disciplines are put to work to solve complex problems of productivity, profitability, environmental quality and human health.
The Agricultural Sciences and Natural Resources Extension Program connects Oregonians to research-based knowledge in a wide variety of topics. Extension programs support production of Oregon’s major crops, management of working landscapes and integrated pest management strategies. In addition, well-known Extension programs — such as Master Gardeners and Small Farms — enrich communities across Oregon.

Equity, inclusion and civil discourse are highly valued within the college. It’s worth remembering that the legislation that established the nation’s land grant university system was intended to educate all the people, not only the privileged class. That original intention has grown within the College of Agricultural Sciences, where diversity and excellence go hand in hand.

**Values**

The College of Agricultural Sciences is:

- Responsive to the needs of those served.
- A reliable source of credible, evidence-based information and education.
- A partner with individuals, organizations, businesses and stakeholders beyond OSU.
- A collaborator with colleagues to tackle complex problems with integrated ideas.
- Open to diverse perspectives in research, outreach and educational efforts.
- An environment of mutual respect among its members and the broader community.
- Accountable for stewardship of resources and for fulfillment of its missions.

**Strategic Plan**

To advance Oregon State University’s Strategic Plan 4.0, the College of Agricultural Sciences will pursue innovative initiatives within its areas of excellence and make intentional, targeted investments to achieve its goals.

**Intentions:**

The college will integrate food systems research across the full spectrum of food issues — breeding new crops, developing food safety practices, creating new products — to build Oregon’s reputation as a global food leader and to address the needs of a growing, hungry world.

It will address critical environmental issues facing Oregon and the world, such as climate change, land use and invasive species, to ensure sustainable use of land, water and resources for future generations.

It will work with Oregon industries to provide research, education and outreach for the development of new precision technologies, new products that add value to resources and new businesses that keep jobs in the state.

It will discover new approaches to improve environmental and human health, reduce risks and reveal the complex mechanisms that drive plant and animal health.

It will help build a world-class marine studies program on the foundation of the college’s recognized excellence in marine resource management, ecology and genetics and seafood-related research and outreach.

It will inspire a new generation of leaders to solve society’s most pressing challenges through mastery of STEM fields — science, technology, engineering and mathematics — and evidence-based, experiential learning throughout Oregon and the world.
It will continue its commitment to the people of Oregon, to address their site-specific needs through a statewide network of facilities, faculty and long-term collaborative relationships.

View the Strategic Intent for the College of Agricultural Sciences.

**Annual Report**

View the [2017-18 Annual Report](#) for the College of Agricultural Sciences.

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**COLLEGE OF BUSINESS**

**Leadership**

Mitzi Montoya, Dean  
Jim Coakley, Senior Associate Dean, Analytics and Operations  
Jonathan Arthurs, Associate Dean, Research and Faculty  
John Becker-Blease, Associate Dean, Graduate Student Development  
Prem Mathew, Associate Dean, Undergraduate Student Development  
Dan Lykins, Executive Director, Teaching and Learning  
Malcolm LeMay, Director, Operations  
Jared Moore, Director, Ph.D. Program

**College Summary**

**Mission**

The mission of the College of Business is to recruit, retain and educate students to be people who work hard, earn success and lead by example as socially responsible, globally minded and innovative business professionals.

**Strategic Plan**

**Undergraduate Student Success Initiatives**

To improve undergraduate retention and completion, the college developed a holistic framework in academic year 2016-17 for student development revolving around personal, professional and leadership skill (PPL) development. The framework was developed by the Undergraduate Student Development Task Force, which includes members from the college’s instructional faculty, and from the academic advising and student engagement teams. The Equity, Diversity and Inclusion (EDI) committee provided feedback on the PPL framework and will continue to advise the task force on student success initiatives.

The framework includes:

- Undergraduate student development
- Undergraduate experiential learning
- Undergraduate academic support
- Undergraduate recruiting
Graduate Student Success Initiatives

To improve graduate student support, a Graduate Student Development faculty task force was formed. This task force adopted a modified version of the undergrad PPL framework for student development. The EDI committee provided feedback on the PPL framework and will continue to advise the Graduate Student Development Task Force on graduate student success initiatives. To increase the quality of graduate students, the college re-evaluated the requirements for graduate program admission to normalize within the peer school group. This led to a significant decrease in qualified applicants from INTO students, which led to a significant reduction in INTO enrollment in 2016 and 2017. To grow graduate enrollment, the college established a graduate recruiting team, dedicated a portion of the marketing communications budget to graduate recruiting and invested in technology to support graduate recruiting.

Faculty Success Initiatives

The college will achieve distinction through the quality of academic programs designed and delivered by college faculty, as well as through the expertise and impact of the faculty through their scholarly and applied work.

The following initiatives will support the college faculty, and the EDI committee will provide ongoing feedback on faculty success initiatives:

- Faculty community development
- Faculty professional development
- Teaching excellence
- Growing the faculty
- Advancing the research culture
- Academic program innovation
- Equity, diversity and inclusion initiatives
- Focused external promotion of faculty excellence

External Engagement Initiatives

The college will also achieve distinction through external engagement, which includes work with alumni and the business community as well as community service. The following initiatives will help the college achieve distinction:

- Volunteer and alumni engagement
- Marketing and communications
- Centers of excellence
- Professional development and executive education
- Corporate engagement
- K-12 outreach

View the Strategic Initiatives for the College of Business.

Annual Report

View the 2017-18 Annual Report for the College of Business.
COLLEGE OF EARTH, OCEAN, AND ATMOSPHERIC SCIENCES

Leadership

Roberta Marinelli, Dean
Tuba Ozkan-Haller, Associate Dean for Research and Faculty Advancement
Eric Kirby, Associate Dean for Academic Programs
Philip Mote, Associate Dean for Strategic Initiatives
Kaplan Yalcin, Assistant Dean of Instructional Programs

College Summary

Vision
The College of Earth, Ocean, and Atmospheric Sciences (CEOAS) will be known globally for pursuing understanding of Earth’s past and present, and for transforming that understanding into solutions for our future.

Mission
The CEOAS mission is to pursue knowledge of Earth’s processes, to apply this knowledge to build a more resilient future, to integrate research and education and to create global citizens and scholars. CEOAS contributes to OSU’s status as a premier research institution, serving Oregon and the world.

Values
• Excellence in the study of the earth, ocean and atmosphere, as well as human interactions with these systems.
• Innovative, comprehensive and forward-thinking education informed by research discoveries, novel technologies and global events.
• Global engagement with thought leaders and communities to apply research toward meeting the environmental challenges of the 21st century.
• An inclusive and welcoming environment where all individuals, viewpoints and styles of scholarship and engagement are respected, strengthening the college.
• Opportunities for professional and personal growth of administrators, faculty, staff and students, including leadership development through shared governance.

Strategic Plan
The strategic plan for CEOAS recognizes a variety of forces that motivate change in order to continue its excellence and impact. Changes to the planet brought on by climate change affect a broad range of CEOAS interests. These include changes in marine ecosystems, weather, water distribution and use, rising sea level and storminess, as well as social responses to these physical changes. The latter includes shifting economies, needs for new infrastructure and human migrations.

Excellence in CEOAS academic programs will be furthered by attracting competitive students through recruitment, scholarship opportunities and delivery of excellent and relevant programs. The college will aim to educate well-rounded students with a range of research, teaching and professional skills, including preparation for earning professional credentials. To this end CEOAS adopts the following goals:
• Adapt existing programs and develop new programs fitting to the college, such as an ocean sciences option and a natural hazards master’s degree or certificate.

• Increase access through nontraditional delivery modes, such as increased remote access to courses and certificates (e.g., distance-education graduate GIScience certificate), as well as delivery of courses and degrees at other facilities (e.g., OSU-Cascades, Hatfield Marine Science Center, Mitchell Field Station).

• Enhance and expand faculty involvement with students through mentoring, teaching and undergraduate research.

• Integrate professional training with academic degree programs, such as more research and internship opportunities, and engage with professionals in the private sector and professional communities.

• Increase diversity and international student enrollment.

• Enhance support for student activities, such as field trips, social activities and workshops (e.g., through SAC and Geo Club).

• Increase and organize participation in the Honors College, such as through project mentoring and courses.

• Develop and maintain facilities that support educational excellence and use of modern technologies, including laboratories, lab equipment, IT infrastructure, classroom space and office space for advisors and staff.

CEOAS is committed to supporting university goals in science literacy through delivery of courses that provide basic science content and skills and that have application to societal and global issues. CEOAS will develop and maintain a suite of courses that serve the Baccalaureate Core and general interest and that align with the staffing and expertise of the college. CEOAS is committed to maximizing its earth sciences educational footprint in the state by working together with other OSU units to support and expand course offerings and degree programs at OSU-Cascades and the Hatfield Marine Science Center (HMSC). Examples of possible programs at OSU-Cascades include mountain studies, climate studies and natural hazards. Examples for HMSC include experiential classes in observational oceanography and coastal and estuarine oceanography.

View the Strategic Plan for the College of Earth, Ocean, and Atmospheric Sciences.

Annual Report
View the 2017-18 Annual Report for the College of Earth, Ocean, and Atmospheric Sciences.

COLLEGE OF EDUCATION

Leadership
Toni Doolen, Dean
Jana Bouwma-Gearhart, Associate Dean of Research
Randy Bell, Associate Dean of Academic Affairs
Jennifer Bachman, Director of Programs and Operations
Nell O’Malley, Director of Licensure
College Summary

Vision
The College of Education will be an international leader in research and in the preparation of change agents in education and related fields.

Mission
- The College of Education develops change agents in the form of researchers, scholars, learning leaders, teachers and counselors. Change agents make a difference by promoting innovation, social justice and lifelong learning. They prepare citizens who are socially empowered, reflective, innovative and caring members of increasingly diverse communities and the world.

Values
- Social Justice: The college values social justice in all aspects of its work. All disciplines must be situated in a context of social justice that acknowledges and embraces inclusivity.
- Innovation: The college values being and developing leading-edge change agents.
- Intersection of practice and research: The college values the intersection of practice and research by informing practice with research and research with practice as change agents and educators.
- Reflection: The college builds reflective practices into all of its work and into the work of students. It considers the knowledge it has and determines what it doesn’t know. The college is open to other perspectives.
- Integrity: The college considers impact in all of its decision making. Its members are change agent in the face of any form of oppression and asks, “What impact does this decision have on the college, its programs and students?”

Strategic Plan
The College of Education contributes to major national dialogues concerning research and the promotion of social justice in:
- The success of English language learners of all ages.
- Developmentally appropriate pedagogy for all ages.
- Learning in science, technology, engineering and mathematics inside and outside of school.
- The preparation of mental health and school counselors.
- Adult and higher education leadership.

The college develops change agents in the form of formal and informal educators, counselors and leaders. These change agents identify issues and act toward social justice and the full development of human potential and society.

The College of Education’s Strategic Plan is focused on four goals:
- Be an international leader in research that informs socially just practices and programs.
- Create a diverse and inclusive community of learners, educators and change agents.
- Engage communities through research, outreach and partnerships to advance learning and share knowledge.
• Provide transformational learning experiences to prepare the next generation of leaders, researchers and change agents.

View the Strategic Plan for the College of Education.

**Annual Report**

View the 2017-18 Annual Report for the College of Education.

## COLLEGE OF ENGINEERING

### Leadership

- Scott Ashford, Dean
- Belinda Batten, Executive Associate Dean
- Dorthe Wildenschild, Associate Dean for Graduate Programs
- Carlos Jensen, Associate Dean for Undergraduate Programs
- Todd Palmer, Associate Dean for Faculty Advancement
- Irem Tumer, Associate Dean for Research
- Brett Jeter, Assistant Dean for Academic Programs
- Scott Paja, Assistant Dean for Experiential Learning and Employer Relations
- Carley Ries, Assistant Dean for Online Learning
- Katheryn Higley, Head, School of Nuclear Science and Engineering
- Tom Weller, Head, School of Electrical Engineering and Computer Science
- Jason Weiss, Head, School of Civil and Construction Engineering
- Harriet Nembhard, Head, School of Mechanical and Industrial Engineering
- Jeffrey Nason, Interim Head, School of Chemical, Biological and Environmental Engineering

### College Summary

**Mission**

The College of Engineering transforms lives and enhances society through impactful education and research. In an inclusive and open environment, it produces:

- Graduates who are highly valued and in demand.
- Solutions to global challenges.
- Partnerships that ensure responsiveness to Oregon and beyond.

**Values**

The College of Engineering reflects these values:

- Excellence: Excellence is derived from a persistent commitment to hard work, diligence, perseverance and consistency in the pursuit of the highest quality in whatever it does.
• Collaboration: The college values engagement and connection at multiple levels in the professional lives of its members — including work relationships, research, scholarship, service and teaching — and believes that collaboration is an important element of professional success.
• Integrity: An uncompromising commitment to honesty underlies everything the college undertakes.
• Innovation: The college values and supports its members in taking risks and creates economic and societal value.
• Respect: The college’s members respect one another in an environment in which they value, consider and are influenced by others’ feelings and perspectives.
• Responsibility: The college recognizes and embraces its role in stewardship of students, colleagues and Oregon’s citizens.

Strategic Plan
1. Become a recognized model as an inclusive and collaborative community.
   b. Envision, develop and resource the infrastructure and communication systems to promote, sustain and celebrate the culture and community.
   c. Live the experience in all interactions across the college daily; dedicate resources to training faculty, students and staff to realize, honor and sustain this culture throughout the college.
   d. Purposefully and thoughtfully recruit and retain a more broadly diverse community.
2. Provide a transformational educational experience that produces graduates who drive change throughout their lives.
   a. Transform student success through impactful learning experiences.
   b. Transform College of Engineering curricula for the needs of the future.
3. Lead research and innovation to drive breakthroughs that change the world.
   a. Invest in, build out, promote and advance research areas in three categories:
      i. Signature research areas to address key global challenges: precision health, clean energy, resilient infrastructure and advanced manufacturing.
      ii. Information technology to provide a stronger foundation for all research activities.
      iii. Targeted strategic areas with existing competitive advantages: robotics, materials research and clean water.
   b. Obtain large, externally funded research centers.
   c. Realize and foster a collaborative, interdisciplinary and creative research environment.
   d. Increase research productivity of tenured, tenure-track and research faculty.
   e. Promote excellence in research by recruiting and supporting high-quality graduate students.
4. Establish the College of Engineering as the partner of choice for industry, government and academia.
   a. Demonstrate college-wide practices to maintain and grow the college’s reputation as the engineering education and research partner of choice for Oregon and the Pacific Northwest, along with global industry and economic sectors.

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b. Implement a strategic calendar of efforts to increase the political influence of the college in state and federal funding streams.

c. Design curricula that are responsive to industry technology, workforce development direction and speed of advancement.

View the Strategic Plan for the College of Engineering.

Annual Report
View the 2017-18 Annual Report for the College of Engineering.

COLLEGE OF FORESTRY

Leadership

Anthony Davis, Interim Dean
Jim Johnson, Senior Associate Dean for Outreach and Extension; Interim Head, Department of Forest Engineering, Resources and Management
Randy Rosenberger, Associate Dean for Student Success
Katy Kavanagh, Associate Dean for Research
Troy Hall, Head, Department of Forest Ecosystems and Society
Eric Hansen, Head, Department of Wood Science and Engineering

College Summary

Vision
The College of Forestry aspires to be the world's premier forest resources education, research and service institution.

Mission
As part of Oregon's land, sea and space grant university, the mission of the College of Forestry is to educate and engage the next generation of scholars, practitioners and users of the world's forest resources, to conduct distinctive, problem-solving and fundamental research on the nature and use of forests and related resources, and to share its discoveries and knowledge with others.

Core Values
Academic excellence is the hallmark of College of Forestry programs. Ranked as one of the premier forestry schools in the world, the college offers a variety of programs that offer broad education, rigorous depth and professional focus. Caring faculty work with students to provide advising, mentoring, research experiences, study abroad opportunities, field labs, exposure to real-world practice and the latest scientific findings. Active student clubs enrich student life through social interaction, links to professional organizations and leadership opportunities. The college's world-class students and faculty conduct groundbreaking research in 19 areas within the subjects of forestry, natural resources, tourism and wood science and engineering. Its research happens in labs, on public and private lands across the state, and in the 14,000 acres of College Research Forests.
Strategic Priorities

- Enhance its standing as a top-tier forestry program.
- Diversify the community.
- Increase enrollment and programmatic opportunities.
- Broaden the funding base.
- Strengthen forestry research lab programs.
- Internationalize the college through strategic partnerships.
- Strengthen public/private partnerships.

Diversity, Equity and Inclusion Strategic Plan

The College of Forestry aspires to create an environment in which all members of the community feel safe, respected and free at all times to participate in various undertakings of the college, including learning, teaching, administration and research.

The College of Forestry strategic plan outlines the high-level goals, strategies and concrete actions the college will take to achieve its objectives to enhance diversity, equity and inclusion:

1. Promote innovation in research and teaching by enhancing creativity through diversity.
2. Ensure equity of opportunity to all persons who work or study in the college.
3. Create a culture of inclusivity and respect within the college and in interactions with partners.

View the Diversity, Equity and Inclusion Strategic Plan for the College of Forestry.

Annual Report

View the 2017-18 Annual Report for the College of Forestry.

GRADUATE SCHOOL

Leadership

Philip Mote, Vice Provost and Dean
Stephanie Bernell, Associate Dean for Academic Programs and Student Affairs
Yanyun Zhao, Associate Dean for Post-Doctorals, Funded Research and ID Programs
Jessica Beck, Assistant Dean for Student Success
Rosemary Garagnani, Assistant Dean for Academic and Enrollment Management
Fran Saveriano, Assistant Dean, Financial Support and Recruitment

Summary

The Graduate School advances Oregon State University's teaching, research and outreach goals by supporting graduate students in all aspects of their education. The Graduate School advocates for the critical importance of the graduate enterprise to the university's mission and provides core-centralized
services to the graduate community. The Graduate School provides financial support to attract the very
best and brightest students and offers opportunities for graduate students to acquire the skills that they
need to be successful in their future career.

Services Provided
• The graduate enrollment management team processed 7,446 degree-seeking and 2,333 non-degree
  graduate applications for admission, managed hundreds of graduate pathway students from INTO OSU
to full admission in graduate programs and provided support to students, faculty and staff to assist
with successful completion of graduate degree programs.
• Offered 37 sections of 16 unique didactic courses under the GRAD designator, some of which are
  affiliated with the Graduate Certificate in College and University Teaching (GCCUT) program.
• Invested heavily in the Graduate Education Toolkit (GET) project to create efficiencies designed to
  automate selected enrollment management processes.
• Managed 76 new graduate student care cases through resolution, in collaboration with academic and
  student affairs units and the University Student Care Team as appropriate.
• Expanded the Graduate School’s professional development curriculum to support soft skills development
  such as presentation, teamwork and networking to enhance the marketability of graduates.
• Provided oversight of the assessment of university graduate learning outcomes for 160 degrees
  across 75 programs.
• Provided information to prospective students, current students, faculty, programs, and post-docs
  online. In the 2017-18 academic year, the Graduate School website had more than 250,000 visitors
  and 1 million page views.

HONORS COLLEGE

Leadership
Toni Doolen, Dean
Tara Williams, Associate Dean
Ben Mason, Assistant Dean

College Summary
The Honors College is a small degree-granting college at Oregon State University enrolling approximately
1,400 students. The Honors College offers the benefits of small classes, a residence hall option, student
learning centers and personal advising, in addition to the research and involvement opportunities of OSU.
Undergraduates who complete the Honors College degree requirements earn an Honors Baccalaureate in
their academic major(s).

Demand for entrance into the Honors College is high and competition strong. Applicants are evaluated
not only on their academic accomplishments but also on their level of writing, while considering
coursework, extracurricular activities and contributions to their community. The Honors College
welcomes students from diverse academic, cultural and geographic backgrounds.
Mission
At the Oregon State University Honors College, the most outstanding undergraduates in each of the university's academic colleges engage in unique curricular and cocurricular opportunities that help them explore their fields and evolve into creative thinkers whose world-class abilities are magnified by global perspectives. The Honors College curricular and cocurricular experiences produce graduates who can create new knowledge and contribute to one or more scholarly areas of study. Honors College graduates have the capacity to fully engage in meaningful dialogue incorporating cross-disciplinary and multidisciplinary perspectives.

Within this context, the mission of the Honors College is to:

• Serve the needs and aspirations of high-achieving undergraduate students in the state of Oregon and the region.
• Provide a transformative educational experience through innovative curriculum, featuring individualized and engaged learning opportunities with talented and dedicated faculty and staff.
• Create a multifaceted honors experience, which includes a compelling residential experience and comprehensive cocurricular programming that provides leadership, service and global learning opportunities.
• Provide meaningful undergraduate research, scholarship and creative work experiences that leverage OSU’s three signature areas: advancing the science of sustainable Earth ecosystems; improving human health and wellness; and promoting economic growth and social progress.

Values
The Honors College is committed to three core values:

• Engagement: The Honors College will provide a transformative educational experience that compels involvement.
• Inclusivity: The complete Honors College experience will be available to and accessed fully by all Honors College students.
• Diversity: The Honors College will create a community of scholars, where all are welcomed, respected and able to fully engage.

The Honors College features:

• A tight-knit community of engaged students, faculty and staff.
• Challenging and creative curricula for students of all majors.
• Unique honors classes, typically limited to 12 or 20 students.
• Courses that complement, not complicate, other coursework.
• Courses taught by professors, not teaching assistants.
• One-on-one mentoring by faculty members while preparing the honors thesis.
• Access to Student Learning Centers for homework, study groups and meetings.
• Academic advising from Honors College advisors.
• An Honors College-themed living-learning community in partnership with West and Sackett residence halls.
• Leadership involvement, trips and events through the Honors College Student Association (HCSA).
Strategic Plan

After nearly two decades of growth, the Honors College is on the cusp of its next wave of development: the creation of a multifaceted honors experience that will be a beacon for high-achieving students in the state and beyond, supporting their growth as campus and eventually world leaders. Building on core values, the Honors College has identified the following strategic priorities — which support OSU’s Strategic Plan 3.0 goals — to guide this development:

**Strategic Priority 1**: Expand experiential learning to provide Honors College students with transformative opportunities in research, leadership, service and global learning.

The Honors College is committed to providing experiential learning opportunities that make the world a classroom. Honors students will engage directly with contemporary challenges through both their honors coursework and honors cocurricular programming.

**Tactic**: In partnership with faculty and staff from academic colleges, academic affairs and student affairs, develop and provide experiential learning opportunities related to research/scholarship/creative activity, leadership, service and global learning through incentive programs such as curriculum development grants and faculty mentoring programs.

**Strategic Priority 2**: Ensure that high-achieving students from all backgrounds, majors and colleges choose the Honors College.

High-achieving students are one of Oregon’s and the region’s greatest assets. Bringing high-achieving students to OSU has a positive impact on the student body of the university and a positive, long-term impact on the state’s economy. Because of their academic credentials and their demonstrated engagement outside of the classroom, students admitted to the Honors College are heavily recruited by other institutions. Competitive scholarship packages are critical to the university’s ability to recruit high-achieving students.

**Tactic 1**: In partnership with the OSU Foundation and academic colleges, develop competitive recruitment scholarship packages to attract high-achieving students from all backgrounds who are interested in the entire range of academic programs at OSU.

**Tactic 2**: Expand outreach and recruitment efforts directed to underrepresented college populations, in partnership with academic colleges and the OSU Office of Admissions, and work to identify and mitigate barriers to application.

**Strategic Priority 3**: Make the complete honors experience accessible to all Honors College students.

More than 25 percent of current Honors College students have been identified as having high financial need, and 34 percent have high or medium financial need. These students will be forced to make difficult choices, (e.g., paying the Honors College differential tuition or paying for books, food and rent). Additionally, students with higher levels of financial need take on part-time employment and are unable to fully participate in enriching curricular and cocurricular opportunities provided by the Honors College due to their need to work.

**Tactic 1**: In partnership with the OSU Foundation and academic colleges, develop Honors Tuition scholarships and expand Experiential Learning/Work scholarships.

**Tactic 2**: Create structures and programs that support access, engagement and success for all Honors College students.
Strategic Priority 4: Grow Honors College enrollments in support of the university’s high-achiever enrollment goals.

The Honors College enrolled approximately 1,187 students in the fall of 2017. As OSU’s undergraduate enrollments grow to more than 25,000 students, the college will grow the size of its incoming class each year to 350 to maintain a critical mass of Honors College students, representing 3 to 7 percent of the on-campus undergraduate population. In addition to meeting enrollment goals, the Honors College must substantially improve honors degree completion rates, which are historically and currently around 50 percent.

Tactic: In partnership with OSU Admissions, the High-Achieving Student Workgroup, the First-Year Experience Task Force and academic colleges, the college will develop goals for increasing nonresident enrollments in the Honors College and ensure consistency in honors first-year programs while customizing honors first-year experiences to increase degree completion rates.

Strategic Priority 5: Expand the Honors College living-learning community to create a comprehensive and compelling Honors College experience, which addresses the needs of all Honors College students.

The current Honors College living-learning community serves approximately half of first-year honors students and less than 10 percent of returning students. There is evidence that Honors College degree completion and success in the honors community is strongly influenced by participating in Honors College living-learning communities. Additionally, common and dedicated space to enable connections between honors students, faculty and the larger community is critical to building a sustainable community.

Tactic: In partnership with University Housing and Dining Services, develop a fully integrated Honors College living-learning community, which will enable substantial integration of living-learning programming and house at least 75 percent of first-year students and 25 percent of returning students.

Annual Report

View the 2017-18 Annual Report for the Honors College.

COLLEGE OF LIBERAL ARTS

Leadership

Larry Rodgers, Dean
Marion Rossi, Associate Dean
John Edwards, Associate Dean
Nicole von Germeten, Director, School of History, Philosophy and Religion
Denise Lach, Director, School of Public Policy
Lee Ann Garrison, Director, School of Arts and Communication
Susan Bernardin, Director, School of Language, Culture and Society
Peter Betjemann, Director, School of Writing, Literature and Film
Kathy Becker-Blease, Director, School of Psychological Science
College Summary

Mission
The College of Liberal Arts (CLA) is the key to transforming OSU into a prominent international research university, achieving its strategic goal of providing transformative learning experiences and strengthening OSU’s impact in Oregon and beyond. The college brings the critical methods and crucial insights of the arts, humanities and social sciences to the enduring and contemporary issues facing the world. The college prepares students for challenging careers and empowers them to live lives of achievement, courage, contribution and meaning. The work of the college contributes to building a more just, secure and promising future for all.

Values
The College of Liberal Arts is a community that includes and values the voices of all people. As such, it recognizes the social barriers that have systematically marginalized and excluded people and communities based on race, ethnicity, gender, sexual identity, socioeconomic background, age, disability, national origin and religion.

The college is committed to the equity of opportunities and to promoting and advancing diverse communities. It values and proactively seeks genuine participation from these historically underrepresented and underserved groups and recognizes them as an essential component of creating a welcoming and rich academic, intellectual and cultural environment for everyone.

Strategic Plan
1. The College of Liberal Arts will build its research profile nationally and internationally.
   a. Create a new endowed faculty position for each school in the next five to 10 years.
   b. Build a Center for the Arts to enhance the visibility of CLA’s creative and scholarly work at OSU and in the community.
   c. Increase support for faculty development of external research proposals and creative funding opportunities.
   d. Increase support for faculty to further OSU’s internationalization efforts through research partnerships and international conferences.

2. The College of Liberal Arts will establish at least one nationally-ranked graduate program in each school.
   a. Secure increased funding for graduate fellowships and teaching assistantships.
   b. Increase the number of stand-alone graduate-level courses in all graduate programs.
   c. Establish a dedicated College of Liberal Arts faculties fund for graduate research facilities.
   d. Establish new graduate programs in areas that have potential for OSU distinction.

3. The College of Liberal Arts will become a leader, at OSU and nationally, in quality and undergraduate education.
   a. Create a plan to guarantee the completion of a College of Liberal Arts degree in four years.
b. Create incentives and support for faculty to develop and implement high-impact educational practices in individual courses and as requirements for majors.

c. Engage in proactive recruitment of high-achieving students and students from underrepresented groups.

d. Create additional scholarship support for undergraduate students.

4. The College of Liberal Arts will become a national leader in diversity, equity and inclusion.

a. Integrate global learning and critical diversity into college curricular offerings.

b. Increase the number and types of study abroad opportunities.

c. Build research and teaching collaborations with university cultural centers, international programs and diverse regional communities.

d. Recruit, hire and retain faculty from diverse and underrepresented communities to enhance the diversity of perspectives at OSU.

5. The College of Liberal Arts will communicate the CLA Advantage and enhance student success and career outcomes.

a. Build career counseling across the college in the context of comprehensive advising.

b. Build a coordinated and aggressive marketing and communications plan for CLA degree programs.

c. Develop high-impact alumni networks and partnerships in Oregon and beyond.

View the Strategic Plan for the College of Liberal Arts.

COLLEGE OF PHARMACY

Leadership

Mark Leid, Interim Dean
Gary DeLander, Executive Associate Dean
Juancho Ramirez, Assistant Dean
Theresa Filtz, Chair, Pharmaceutical Sciences
David Bearden, Chair, Pharmacy Practice
Jennifer Davis, Director of Student Health Pharmacy
Angela Austin Haney, Director/Head Advisor for Student Services
Tanya Ostrogorsky, Director of Assessment and Faculty Development
Kerry McPhail, Director of Graduate Studies
Arup Indra, Director of Graduate Admissions
College Summary

**Vision**
The faculty and students of the College of Pharmacy will be innovators and leaders in transforming health care to create positive patient outcomes through the discovery and translation of research and scholarship.

**Mission**
The College of Pharmacy’s mission is to advance societal health through leadership in pharmacy education, research, community engagement and improved patient care.

**Values**
The College of Pharmacy encompasses these values:

- Be the pharmacy resource for the state of Oregon.
- Position its students to be the most competitive and sought after for employment and post-graduate success.
- Promote a culture of critical thinking and evidence-based decision making.
- Recruit and retain diverse and high-achieving students, faculty and staff.
- Develop leaders who will positively impact society.
- Establish key partnerships, collaborations and strategic alliances.
- Enhance the relationship with alumni.
- Strengthen its research program and promote the dissemination and application of scholarship.

**Strategic Plan**
1. Leadership
   a. Alumni satisfaction with and support of the College of Pharmacy.
   b. Graduates of the program entering leadership positions.
   c. Selection on local and national committees, boards and advisory roles.
   d. Student confidence in their capacity to be innovators and leaders.
2. Innovation in Education and Research
   a. Increase in number and quality of grants, patents and publications.
   b. The College of Pharmacy program is referenced by others and used as a resource.
   c. Increase in students and alumni who participate in research and scholarship.
   d. Leadership in interdisciplinary educational and research collaboration.
   e. Awards won from local, national and international organizations by students and faculty.
   f. Increased numbers and quality of partnerships, collaborations and strategic alliances.
   g. Increased numbers of students pursuing training or certification beyond the Pharm.D. or Ph.D.
3. Transformation of Health Care
   a. More progressive pharmacy practice models in the state.
   b. The College of Pharmacy program is referenced by others and used as a resource.
   c. Interprofessional education; anything relating to medication use systems is taught by the College of Pharmacy.
   d. Increase in students/graduates who drive change in the delivery of patient care.
   e. Confidence of preceptors that students are well prepared to provide a level of patient care above baseline medication therapy management (MTM).
   f. Increased number of faculty working in clinical research and innovative clinical practice models.
   g. Leadership in interdisciplinary research collaborations.

View the Strategic Plan for the College of Pharmacy.

**Annual Report**

View the [2017-18 Annual Report](#) for the College of Pharmacy.

**COLLEGE OF PUBLIC HEALTH AND HUMAN SCIENCES**

**Leadership**
- Javier Nieto, Dean
- Sheryl Thorburn, Associate Dean for Academic and Faculty Affairs
- Vicki Ebbeck, Associate Dean for Student Success
- Marie Harvey, Associate Dean for Research
- Roberta Riportella, Associate Dean for Outreach and Engagement
- Norm Hord, Head, School of Biological and Population Health Sciences
- Rick Settersten, Head, School of Social and Behavioral Health Sciences
- Chunhuei Chi, Director, Center for Global Health
- Carolyn Aldwin, Director, Center for Health Aging Research
- Megan McClelland, Director, Hallie Ford Center for Healthy Children and Families
- Emily Ho, Director, Moore Family Center for Whole Grain Foods, Nutrition and Preventive Health
- Allison Myers, Director, OSU Center for Health Innovation

**College Summary**

**Vision**
To ensure lifelong health and well-being for every person, every family, every community in Oregon and beyond.
Mission
Through integrated education, research and outreach, the College of Public Health and Human Sciences advances scientific discovery and implementation of ideas to improve population health and prepare the next generation of globally minded public health and human sciences professionals. As part of a land grant university, the college connects science to policies and practices in communities that increase people’s quality of life and capacity to thrive.

Values
The College of Public Health and Human Sciences shares the values that guide Oregon State University: accountability, diversity, integrity, respect and social responsibility. To these values, the college adds dedication to:

- Equity: The college is committed to advancing lifelong health and well-being for all.
- Care and Compassion: With compassion and understanding, the college commits to caring for itself and others.
- Innovation: The college embraces innovative approaches to addressing challenges and opportunities.
- Continuous Improvement: The college maintains high standards by optimizing individual and collective strengths.
- Collaboration: The college promotes a supportive, collegial and inclusive learning and work environment.

Strategic Plan
Overarching Goal: Champion the discovery and implementation of ideas that advance the lifelong wellness of people and communities as part of OSU’s integrated health sciences initiative.

Goal I: Lead integrated health sciences research to improve the health of individuals, families and communities.

1. Leverage and invest in health sciences research to identify problems and discover innovative solutions that improve human health and well-being across the lifespan.
2. Expand research capacity to provide solutions for emerging health priorities, such as mental and behavioral health.
3. Integrate basic and community-engaged research through translation, implementation science and program evaluation.

Goal II: Graduate public health and human science professionals prepared to meet the complex health challenges of the 21st century. This is measured by:

1. The number and quality of interdisciplinary collaborations across the college and the university.
2. The volume and diversity of external funding and the college’s funding portfolio.
3. The strength and visibility of signature research initiatives that impact health of people and communities.

Goal III: Enhance programs and partnerships that foster community engagement and positively impact communities in Oregon and globally.
1. Increase community impact of research and education by expanding cross-college, cross-institutional and cross-sectoral partnerships with business, government agencies and community organizations.

2. Work collaboratively with communities to help them reach their goals by providing scientific and technical expertise in support of priority setting, program implementation and program evaluation.

3. Continue to increase the integration of OSU Extension Service and on-campus programs and faculty to increase impact.

**Enabling Goal**: Create a supportive work climate and a culture of health that promotes equity, inclusion and social justice.

1. Enhance efforts and resources to increase visibility of the college both in and outside OSU.

2. Improve administrative processes to increase efficiency and support.

3. Foster a participative, collaborative and supportive work climate.

4. Increase academic recognition and appreciation of everybody’s work within the college.

5. Promote equity, inclusion and social justice in all programs and partnerships.

View the [Strategic Plan](#) for the College of Public Health and Human Sciences.

**Annual Report**


**COLLEGE OF SCIENCE**

**Leadership**

Roy Haggerty, Dean
Matt Andrews, Executive Associate Dean
Douglas Keszler, Associate Dean of Graduate Studies and Research
Henri Jansen, Associate Dean of Academic and Student Affairs
Mike Lerner, Head, Department of Chemistry
Jerri Bartholomew, Head, Department of Microbiology
Andy Karplus, Head, Department of Biochemistry and Biophysics
Bill Bogley, Head, Department of Mathematics
Heidi Schellman, Head, Department of Physics
Virginia Weis, Head, Department of Integrative Biology
Debbie Farris, Director, Marketing and Communications
Andrew Wheeler, Director, Information Network
Patrick Reardon, Director, Nuclear Magnetic Resonance Facility
College Summary

Mission
The College of Science mission is to advance science and build global leaders for a healthy people, living on a healthy planet, in a healthy economy.

Vision
The College of Science is a nucleus of learning, societal engagement, achievement and discovery at Oregon State University. The college conducts essential fundamental research to advance knowledge and to enable solutions to major societal problems through collaborative relationships while inspiring and building diverse leaders in science to make communities and the world better.

The college is a place of choice for faculty and students to thrive. Recognized internationally for research and training, its faculty are excited to excel at OSU. To help OSU become a top 10 land grant institution and a global university, the college will outpace its peers as measured by high-impact publications, funded research, visibility, industrial and international partnerships and workforce development.

The college affirms its strong commitment to student success and to integration of disciplinary education, research, communication and professional skills development to create scientists poised for career success and lifelong learning. It will recruit and retain a community of doers who value diversity of thought. The college’s OneScience community pursues excellence and is always inclusive.

As a global center of excellence in research and pedagogy, the college is known for strengths in ecological and quantitative sciences that inform public policies on climate change; materials science to identify cost-effective sources of renewable energy and technology for a smart, sustainable planet; biological sciences to advance understanding of disease mechanisms to improve animal and human health; and data sciences to enhance the quality of its research and spur economic development.

Values
• **Excellence**: The college pursues excellence in everything it does, from teaching and research to outreach and service. It takes pride in the quality of its work. It focuses on the intellectual growth of all members of its OneScience community. It achieves excellence and work-life satisfaction by working smarter.

• **Diversity**: Diversity is the cornerstone of the college’s community. Through a rich collection of people, ideas and perspectives, the college engages in a healthy, constructive dialogue to learn, inform research and make discoveries. From differences comes excellence. The college is committed to creating a welcoming and inclusive environment that respects and affirms the dignity, value, identity and uniqueness of everyone.

• **Harmony**: The college values harmony and constantly looks to connect and collaborate with colleagues across all areas of research and learning. The college works without borders to maximize results and to enhance faculty and student success.

Strategic Plan
The College of Science strategic plan has three major goals for people, the planet and prosperity:

1. To build a diverse and inclusive science community focused on excellence.
   a. Proactively recruit nationally and internationally and retain a diverse and productive community of faculty, staff and students.
b. Enhance and equalize student success by improved mentoring, advising and pedagogy that are based on data, technology and STEM education research.

c. Cultivate graduates for career success in a global economy by developing translational skills to convert knowledge to application so it flows to communities, and by creating high-impact experiences, such as internships, service learning, leadership training, research and international opportunities.

d. Grow online education programs, including introductory courses; targeted degrees; platforms to bridge prior education achievements and entry requirements; and workshops and certificates.

e. Enhance mentoring and career development programs for all faculty and staff by strengthening a culture of continuous improvement.

2. To be a global leader in scientific research and scholarship for a better world.

a. Cultivate distinction in research by enriching and growing specific programs through investment in cross-disciplinary and international collaborations.

b. Deepen and enrich a leading-edge and responsive research portfolio by focusing early-career faculty investments in areas that advance knowledge to support human health, marine science and sustainable materials.

c. Position the college as a leader in cross-cutting data science and mathematical modeling research and educational programs.

d. Enhance research capacity and productivity by improving infrastructure.

e. Promote student curiosity, discovery and creativity by integrating undergraduate research and international opportunities across the curriculum, and by strengthening and expanding graduate programs to match national and market needs.

3. To excel in outreach, engagement, visibility and economic development.

a. Expand partnerships with the OSU Outreach and Engagement and Research Impacts Network to promote public understanding, lifelong learning and civic engagement.

b. Enhance engagement of key external constituents, including alumni and friends, to advance and support the college’s mission.

c. Engage more deeply with policymakers and government agencies on state and federal initiatives.

d. Enhance marketing and communications efforts to show how the college’s contributions address today’s most pressing problems and advance science.

e. Drive economic development by nurturing innovation in education and by helping to build an ecosystem for successful translation of fundamental research for societal benefit in partnership with the OSU Research Office.

View the Strategic Plan for the College of Science.

Annual Report
View the 2017-18 Annual Report for the College of Science.
CARLSON COLLEGE OF VETERINARY MEDICINE

Leadership

Susan Tornquist, Dean
Stacy Semevolos, Associate Dean of Student and Academic Affairs
Luiz Bermudez, Head, Department of Biomedical Sciences
Chris Cebra, Chair, Department of Clinical Sciences
Mark Ackermann, Director, Oregon Veterinary Medical Laboratory
Helio de Morais, Director, Veterinary Teaching Hospital

College Summary

Mission
The Carlson College of Veterinary Medicine serves the needs of Oregon, the nation and the world by training the next generation of practice-ready veterinarians, providing state-of-the-art diagnostic and clinical services and supporting the continuing education of veterinary practitioners. Biomedical research conducted at the college increasingly expands the scope of veterinary medicine to address both animal health issues and the relevance of animal diseases to public health.

Values
- Respect: Equality, civility, diversity and professionalism
- Integrity: work ethic, honesty and character
- Responsibility: sustainability, transparency, communication and social responsibility
- Excellence: quality, innovation, dedication, commitment, service and education/research

Strategic Plan
1. Student/Trainee Career Success
   a. Accelerate the college's ability to provide relevant, experiential instruction and preparation for all students and trainees to ensure they excel upon program completion and continue to succeed throughout their careers in a rapidly changing environment of job and professional opportunities.

2. Excellent Services
   a. Provide increasingly comprehensive services that continue to meet local and regional needs while focusing attention on developing innovation and unique capabilities that are recognized and impactful at the national level.

3. Value a Supportive and Inclusive Environment
   a. Create a collegial, professional working and learning environment that is supportive of all; one that both values and demands respectful communication; encourages collaborations and allows everyone to contribute their best at all times.
4. Increased Discovery
   
   e. Increase faculty, staff and student involvement in research and scholarly activities to identify and define poorly understood aspects of the natural world.

View the Strategic Plan for the Carlson College of Veterinary Medicine.

**Annual Report**

View the 2017-18 Annual Report for the Carlson College of Veterinary Medicine.

**OFFICE OF EQUAL OPPORTUNITY AND ACCESS**

**Leadership**

Kim D. Kirkland, Executive Director, Equal Opportunity and Access and Title IX Coordinator
Penelope Daugherty, Interim Director of Investigations
Gabriel Merrell, Director, Access and Affirmative Action and Deputy ADA Coordinator

**Office Summary**

The Office of Equal Opportunity and Access (EOA) is responsible for overseeing compliance for equal opportunity, civil rights, Title IX and affirmative action laws, regulations and policies. It safeguards a just and productive learning and working environment for students, faculty and staff, including coordinating the university’s Title IX, Americans with Disabilities Act and Section 504 activities. The office not only responds to reports of harassment and discrimination, but works to create an equitable experience for the university community.

**Major Focus**

- Develop and implement Affirmative Action plans for women, minorities, veterans and individuals with a disability.
- Review and/or approve waivers and exceptions to the search and screen process.
- Investigate and resolve complaints and reports of sexual misconduct and harassment, discrimination, bullying, retaliation and violations of the consensual relationships policy.
- Provide reasonable accommodations (disability, religion and language) through an interactive process, ensuring institutional accessibility for employees and student workers.
- Facilitate awareness and educational training programs aimed at prevention and response efforts related to EEO compliance and safeguarding inclusive environments for all Oregon State University members.
- Serve on university, local and national councils and committees, such as the Accessible University Advisory Committee; Admissions and Attendance Task Force; Bias Response Team; Oregon State University Children, Youth and Family Committee; Consortium of Title IX and Equity Coordinators; and Student Care Team.

**Mission**

The Office of Equal Opportunity and Access supports the most wholesome and productive learning and working environment for students, faculty and staff. Individuals who believe they have been unlawfully harassed or discriminated against are encouraged to contact the office.
Annual Report
View the 2016-17 Annual Report for the Office of Equal Opportunity and Access.

ECAMPUS

Leadership
Lisa Templeton, Associate Provost
Rebecca Badger, Director, Marketing and Enrollment Services
Alfonso Bradoch, Director, Program Insights
Jessica DuPont, Executive Director, Market Development and the Student Experience
Kathryn Linder, Director, Ecampus Research Unit
Marleigh Perez, Director, Student Success
Shannon Riggs, Executive Director, Course Development and Learning Innovation
Karen Watté, Director, Course Development and Training
Staci Beymer, Executive Assistant

Division Summary
As a national leader in online education, Oregon State University Ecampus engages in innovative and creative partnerships to provide access to exceptional learning experiences that transform the lives of students in Oregon and around the world. Ecampus serves as a model of success by staying true to the land grant mission that has guided OSU for 150 years and by embracing the university’s responsibility to serve learners everywhere.

In January 2019, U.S. News & World Report ranked Ecampus third in the nation for Best Online Bachelor’s Programs — OSU’s fifth straight year in the top 10. U.S. News & World Report also ranked Oregon State ninth for its master’s-level online engineering programs. Ecampus consistently earns these distinctions due to OSU’s faculty excellence, high levels of student engagement and expansive support services for distance learners.

Mission
As a leader in online education, Ecampus engages in innovative and creative partnerships to provide access to exceptional learning experiences that transform the lives of students in Oregon and around the world.

Values
• Access: Helping learners earn degrees and reach educational goals online.
• Collaboration: Working together, sharing talents, pitching in, partnering with others.
• Diversity and Inclusivity: Welcoming new people, seeking out new ideas and new ways of doing things.
• Evidence and research: Making data-driven decisions, using and contributing to research literature.
• Innovation: Inventing new tools and strategies, creatively solving problems.
• Integrity: Being honest and ethical in all it does.
• Leadership by example: Taking initiative and walking the talk, every employee, every day.
• Organizational health: Supporting each other, celebrating successes, investing in professional development, making this an organization employees are proud to be part of.

• Quality: Setting high standards, striving for excellence, continually improving.

• Support and advocacy: Empathizing with those served, responding to their needs, advocating on their behalf.

Goals
Ecampus fulfills its mission and abides by its values in many ways in its day-to-day work. The mission and values also inform goals for the future. The following are division-wide goals:

Goal 1: Create access to in-demand, educational pathways for adult learners that will grow Ecampus enrollment with a focus on quality and affordability.

Goal 2: Invest in teaching and learning innovation and research-based online course design to continuously improve the quality of Ecampus courses and programs.

Goal 3: Provide intentional student support through student success initiatives and best practices in an effort to connect and inform Ecampus students to retain them and help them meet their educational goals.

Goal 4: Expand Ecampus’ role as a national leader in online education through exceptional degree programs and services to students and faculty, and by providing access to open educational resources and actionable research.

Goal 5: Inspire and engage campus partners through innovation, collaboration, problem-solving and proactive communications.

Goal 6: Invest in new infrastructure, operational processes, data-driven tools and cross-unit collaborations that are necessary to be nimble and efficient in achieving division goals.

Goal 7: Create and foster a healthy organization known for its positivity, inclusivity and diverse and inspiring culture.

OFFICE OF ENROLLMENT MANAGEMENT

Leadership

Noah Buckley, Interim Associate Provost, Enrollment Management; Director, Admissions
SueAnn Bottoms, Director, Precollege Programs and SMILE
Stephanie Carnahan, Director, GEAR UP
Colleen Conniff, Director, Scholarships
Joy Jorgensen, Executive Assistant to the Associate Provost
Rebecca Mather, Associate Provost and University Registrar
Keith Raab, Director, Financial Aid
Blake Vawter, Associate Director, Admissions
Ben Wessel, Manager, Enrollment Management Information Technology
Office Summary

Vision
Orchestrate collaborative, mission-driven solutions that achieve enrollment goals and establish OSU as a clear leader in access and student success.

Mission
Setting and fulfilling enrollment goals, recruiting and retaining students, providing access and caring for students throughout their college careers.

Services Provided

• The Office of Admissions identifies, recruits and admits qualified undergraduate applicants to Oregon State University in alignment with enrollment goals. In collaboration with campus partners, admissions promotes access and diversity in keeping with OSU’s land grant mission. Admissions seeks to attract and enroll those who will thrive at OSU, who will help others thrive, and who will continue to benefit from their OSU experience beyond graduation.

• The Degree Partnership Program (DPP) allows students to be jointly admitted and enrolled at OSU and any community college partner schools. DPP is open to all undergraduate students pursuing bachelor’s degrees. International students may also participate in the program with Linn-Benton Community College and Portland Community College, but are required to work with their international advisors. Postbaccalaureate students may also participate in the program, but must first be admitted to OSU.

• Enrollment Management Information Technology (EMIT) provides tools and support to serve the offices of Admissions, Financial Aid, Registrar, Precollege and Scholarships. EMIT helps departments make the most of student information systems, third-party data integration, digital marketing, business and data analysis, routine reporting and hardware management.

• The Office of Financial Aid supports the mission of the university and enrollment management by providing access to higher education and equality of education opportunity. The office provides monetary assistance to students who can benefit from further education, but who cannot do so without financial assistance. The quality and services of the financial aid programs have a direct impact on the recruitment and retention of students and the pursuit of academic achievement. The office administers funds from federal, state, institutional and private sources to insure higher educational opportunities to all eligible students.

• The Office of Precollege Programs (PCP) supports and oversees a wide range of programs designed to increase the success of Oregon’s youth. Programs ranging from after-school clubs to summer camps, along with K-12 teacher professional development, provide students from diverse backgrounds with pathways to higher education. PCP also offers administrative services to enhance the collaboration, synergy and efficiency of programs in the OSU Precollege Education Network (OPEN).

• The Office of the Registrar is an innovative university partner offering a clear path for student success. The registrar ensures Oregon State’s institutional integrity by providing enrollment and instructional services, maintaining academic history and supporting students, faculty and staff.

• The Office of Scholarships collaborates with partners across campus to promote OSU’s land grant mission of access, diversity and scholarship. The office serves all OSU scholarship recipients and works to encourage engagement, leadership and research throughout the state, the nation and the world. The Office of Scholarships seeks to improve the financial resources and opportunities available to students and their families.
OFFICE OF FACULTY AFFAIRS

Leadership

Susan Capalbo, Senior Vice Provost, Faculty Affairs
JoAnne Bunnage, Director, University Accreditation
Faye Chadwell, Delpha and Donald Campbell University Librarian and Director, OSU Press
Sara Daly, Executive Assistant to the Senior Vice Provost
Anne Gillies, Director, Search Advocate Program
Michelle Klotz, Faculty Affairs Associate
Christine Schaaf, Work-Life Coordinator
Christopher Viggiani, Director, Policy and Standards
Jane Waite, Social Justice Associate

Office Summary

The senior vice provost for faculty affairs provides oversight for university-level promotion and tenure review, faculty awards and recognition programs, faculty leadership development programs, faculty personnel matters that rise to the university level, academic policies and academic faculty labor relations. The office coordinates with the deans and other colleagues in the recruitment of tenure and fixed-term faculty.

The senior vice provost also leads the development of the university’s next strategic plan and is responsible for the university’s accreditation requirements outlined by the Northwest Commission on Colleges and Universities (NWCCU). Regional accreditation is the highest form of accreditation the university can achieve and communicates how effectively OSU is fulfilling its mission, the plans that support that mission and the value of OSU’s degrees. University accreditation efforts align with Oregon State University’s mission and core themes, as outlined in the strategic plan.

Mission

Oregon State University is committed to developing its faculty and staff, which in turn enhances the success of OSU students, builds the reputation and global impact of the university’s scholarship and research and improves its institutional climate.

Services Provided

The Office of Faculty Affairs offers a variety of resources to contribute to the development and advancement of OSU’s faculty. These range from faculty development workshops and promotion and tenure support to hiring initiatives such as the dual-career hiring initiative and the tenured faculty diversity initiative. The senior vice provost also leads the university-wide effort in strategic planning. The engagement and planning process seeks to assess accomplishments since the university’s first strategic plan, refine areas of strategic focus, identify or modify campus-level goals, consider current opportunities and challenges and inform the prioritization of actions and investments.
DIVISION OF FINANCE AND ADMINISTRATION

Leadership

Michael Green, Vice President, Finance and Administration
Ron Adams, Interim Senior Associate Vice President, Finance and Administration
Heather Hesano, Treasury Director, Finance and Administration
Jan Lewis, Interim Associate Vice President and Controller, Business Affairs
Sherm Bloomer, Director, Budget and Fiscal Planning
Anita Azarenko, Associate Vice President, University Facilities, Infrastructure and Operations
Patrick Hughes, Chief Risk Officer, Enterprise Risk Services
Cathy Hasenpflug, Chief, Human Resources
Suzy Tannenbaum, Chief, Public Safety

Division Summary

Vision
Innovating for a 21st-century land grant university.

Mission
The Division of Finance and Administration provides leadership, innovative services, creative solutions and integrated systems that enable the university mission through collaborative stewardship of human and financial resources within an environment of transparency and exemplary service.

Values
The Division of Finance and Administration embodies the university’s core values of accountability, diversity, integrity, respect and social responsibility by:

Empowering Others: Helping students, faculty, staff and other stakeholders attain success. The division supports employees in delivering excellent, effective and innovative service by providing training and resources and placing decision-making authority at appropriate levels. The division believes its employees are individually accountable for their actions, results and behaviors.

Encouraging Openness and Transparency: The division collaborates with the diverse communities within and across units and divisions. It provides clear and effective communication. It focuses on teamwork and continuous improvement of current processes and policies in service to customers and other stakeholders.

The division’s leadership team formally adopted and is committed to the Provost Council’s Ethos for building and maintaining a community in which all members are committed to the growth, development and well-being of every other member. To achieve this community, each member of the division commits to:

- Accept responsibility for the well-being, equitable treatment and success of each person.
- Act ethically.
- Acquire the knowledge, skills and self-awareness needed to be responsible community members and leaders.
- Establish relationships of trust and honesty where the integrity of each person is respected.
• Honor the worth of everyone, including their rights to self-determination, privacy and confidentiality.
• Respect each person’s identity and eliminate the effects of socialized biases.
• Treat each other with courtesy, openness, understanding and forgiveness.
• Use the recognition of power and privilege to actively address issues of equity and inclusion.
• Value personal integrity and self-improvement as a pathway to recognizing the worth of each person.

**Major Focus**

The Division of Finance and Administration acts as an innovative partner, delivering excellent service to the OSU community. The division’s primary responsibility is to ensure the fiscal and administrative health of the university, and its priority is the success of everyone learning and working at or with OSU. The division has created specific strategies and objectives that focus on achieving results and outcomes while honoring the talents and perspectives that individuals bring to the university. It promotes the overall success of Oregon State, provides safe environments that encourage the health and wellness of its people and ensures that OSU’s resources are used effectively. The division is responsible for identifying meaningful metrics and quantifying targets, as well as implementing plans to successfully meet them.

**Services Provided**

- **Budget and Fiscal Planning**
  - Prepares and allocates OSU’s Education and General Funds Budget.
  - Provides collaborative budgetary assistance for all administrative, academic, research and public services units.
  - Prepares and distributes financial statements and reports.

- **Controller’s Office**
  - Business Affairs: student accounts, ID center, cashiers, ecommerce, payroll and vendor management.
  - Financial accounting and analysis.
  - Procurement, contracts and materials management
    - E-procurement, accounts payable, procurement and contract services, construction contracts administration, surplus property and campus recycling.
  - Business Centers: financial transaction and consultation support.

- **Human Resources**
  - Employment services (recruitment, selection, onboarding, termination), leave management, performance management.
  - Benefits administration, classification and compensation, employee recognition, training and professional development, workforce development and strategy, health and wellness programs.
  - Employee and labor relations.
  - Human resource business partnerships — transaction and consultation support.
• Department of Public Safety
  o Safety and law enforcement, emergency preparedness and resources, after-hours escorts and vehicle help, building access and alarms and safety education.

• Enterprise Risk Management
  o Risk assessment and insurance services, workers compensation, international travel resources, safety inspections and assessments, education and training.

• University Facilities, Infrastructure and Operations
  o Capital planning, building/project design and construction, leasing and real property management, space management, sustainability efforts, land use planning and architect.
  o Facilities services.
  o Transportation services (parking, campus shuttle, bike parking and rentals, motor pool, SafeRide escort and emergency rides, Ride Share and alternative transportation programs).

**Strategic Plan**

**Goal 1: Service**

Provide the highest levels of service to promote the success of OSU students, its colleagues in the OSU community and the public using the best available tools, technologies and practices.

a. Develop, communicate and implement clear, consistent and customer-focused policies, processes and programs that focus on enabling and supporting student, faculty and staff success.

b. Create a culture of service excellence that enables the success of the OSU community every day.

c. Create a diverse and inclusive environment that fosters success throughout the OSU community.

**Goal 2: Safety and Health**

Provide a safe environment that protects and encourages improvements in the health and wellness of all aspects of the OSU community.

a. Ensure that physical spaces and environments are safe and accessible for everyone.

b. Provide opportunities for people to enhance their health, well-being, personal growth and professional development.

**Goal 3: Stewardship**

To ensure that all human, financial, physical, environmental and animal resources entrusted to the university are deployed in an effective, efficient, transparent and socially responsible manner.

a. Advance financial, social and environmental responsibility at all levels throughout the OSU community.

b. Create and implement shared and integrated systems and resources.

c. Create a culture of innovation that supports efficiency, effectiveness and transformational ideas for doing business.

View the [Strategic Plan](#) for the Division of Finance and Administration.
DIVISION OF INFORMATION SERVICES AND TECHNOLOGY

Leadership

Jon Dolan, Interim Vice Provost, University Information and Technology/CIO
Scott Emery, Director, IT Relations
David Goodrum, Director, Academic Technology
Kent Kuo, Director, Enterprise Computing
Dave Nevin, Director, IT Security Operations
Derick Whiteside, Director, Web and Mobile Services
Andrew Wheeler, Director, Client Services
Johan Reinalda, Director, Network and Telecommunications
Shayne Huddleston, Director, Infrastructure
Erica Lomax, Director, Identity and Access Management
Michale Hansen, Executive Director, Institutional Analytics and Reporting

Division Summary

Mission
Information Services builds and maintains a technology ecosystem at OSU that enables scholarship, learning and community engagement in an environment where innovation and academic excellence thrive.

Vision
A robust, scalable, and adaptable IT ecosystem that:
- Provides a rich array of services and technology, anytime and anywhere.
- Enables people to use data and information that is accurate and actionable.
- Innovates with technology to help OSU achieve its goals and reduce risks.

Services Provided
- Institutional Analytics and Reporting provides a central source of reports and institutional data, conducts institutional reporting and promotes data literacy and data analytics.
- Academic Technologies manages and promotes the use of OSU’s learning management system and related tools; enables the use of innovative pedagogy; provides consulting services on the effective use of instructional technologies; designs and maintains audio-visual infrastructure in classrooms and other curricular and cocurricular spaces; and provides production services for faculty, staff and students creating audio-visual media.
- Client Services provides device and application support for OSU faculty, staff and students.
- Enterprise Computing Services maintains core administrative systems, develops new business applications, supports implementation of new administrative software and frameworks, establishes new models for data integration and improves efficiencies in existing applications.
• IT Infrastructure Services (infrastructure, identity and access management, network and telecommunications) manages OSU’s core computing and networking infrastructure, manages construction and operation of shared infrastructure, ensures high-quality wired and wireless network capabilities, enables telephony and provides identity and authentication services.
• Web and Mobile Communications offers web publishing and content management services and maintains a university mobile application.
• Information Security assists the campus in assessing and prioritizing risks; educates and informs the campus community on best practices; supports the development and application of policies regarding data classification, management, and protection; and responds to security incidents.

Annual Report
View the 2017-18 Annual Report for the Division of Information Services.

OFFICE OF INSTITUTIONAL DIVERSITY

Leadership
Charlene Alexander, Vice President and Chief Diversity Officer
Scott Vignos, Assistant Vice President, Strategic Diversity Initiatives
Allison Davis-White Eyes, Director, Community Diversity Relations
Jeff Kenney, Director, Institutional Education for Diversity, Equity and Inclusion
Brandi Douglas, Assistant Director, Outreach
Dawn Marie Alapisco, Native American Graves Protection and Repatriation Coordinator
Pamela Johnson, Executive Assistant

Office Summary

Mission
The Office of Institutional Diversity (OID) opened in 2015 to plan, lead and implement — in collaboration with university partners — institutional change actions and initiatives to advance diversity, equity and inclusion throughout all facets of the university. OID’s work advances more rapid progress toward OSU’s highest aspirations for inclusive excellence.

Framework
OID conducts its work through a social justice framework. This framework organizes the work it does to advance inclusive excellence and also how the work is done. OID’s social justice framework is guided by the following principles: Our social justice framework is guided by the following principles:
• Focusing on overcoming institutional structural barriers.
• Counteracting unfairness and inequity.
• Paying attention to how people, policies, practices and every part of the organization can collaborate.
• Recognizing the importance and impact of historical and institutionalized social categories, including race, class, gender, sexual orientation, ability and others.
• Actively addressing dynamics of bias, oppression and privilege.
• Recognizing that every member of the university plays a key role in advancing the goals of diversity, equity and inclusion.

OID advances its work using a social justice framework by:
• Raising awareness.
• Working to identify the root causes for injustice.
• Creating capacity.
• Building networks and partnerships.
• Influencing decision-making across the institution.
• Monitoring and regularly reporting outcomes.

**Strategic Goals**

**Goal 1:** Integrate and advance inclusive excellence within all aspects of the university.

**Goal 2:** Improve recruitment of students and employees from underrepresented communities.

**Goal 3:** Create an inclusive university climate to support the retention and success of all students and employees.

**Goal 4:** Provide innovative and transformative learning experiences enabling all students and employees to advance inclusive excellence.

**Goal 5:** Communicate Oregon State’s accomplishments, initiatives and innovations as the university advances inclusive excellence.

View the [Strategic Plan for the Office of Institutional Diversity](#).

**OFFICE OF INTERNATIONAL AFFAIRS**

**Leadership**

Kendra Sharp, Senior Advisor to the Provost for International Affairs
Katherine Morris, Assistant to the Senior Advisor
Deborah Parkins, International Agreement and Delegation Coordinator
Judi Saam, Analyst and Programmer
Jennifer Murphy, International Scholarship Coordinator

**Office Summary**

**Major Focus**

In 2017, Oregon State decided to dismantle the Division of International Programs, a strategic choice to integrate international programs and supports into the core administrative units rather than build up a separate administrative silo dedicated specifically to serving international activities, students and scholars.

For example, the Office of Global Opportunities (OSU GO), OSU’s central study abroad support unit, is overseen by the vice provost for undergraduate education, reflecting OSU’s goal to make study abroad a
growing component of students’ learning experience, especially at the undergraduate level. The Office of International Services (OIS) is overseen by the vice provost for student affairs and serves as the central resource supporting international students, as well as scholars and faculty, by providing help with visa and immigration issues, international visitors, international hiring and international travel.

International admissions is coordinated jointly by the executive director of INTO OSU and the vice provost for enrollment management and is led by the director of international admissions, with close consultation with the vice provost for undergraduate education and vice provost and dean of the Graduate School.

This integrated model prioritizes advancing OSU’s internationalization strategy and agenda as a role and responsibility of multiple senior leaders, especially the vice provost for undergraduate education and the vice provost and dean of the Graduate School, the vice president for research, the vice provost for student affairs, the vice provost for enrollment management, and the executive director of INTO OSU.

The senior advisor to the provost for international affairs will have responsibility for working with faculty, administrators and INTO OSU leadership to develop and implement a comprehensive internationalization strategy consistent with the goals articulated in Strategic Plan 4.0, monitor progress on its implementation and facilitate coordination across administrative units responsible for various components of the agenda. The senior advisor will chair an international council of university leaders for this purpose.

The senior advisor will serve as strategist and coordinator rather than direct manager of central campus programs. A small core staff provides support to the senior advisor to assist with the strategy making and coordinating functions.

Annual Report
View the 2015-16 Annual Report for the Office of International Affairs.

OSU-CASCADES

Leadership
Becky Johnson, Vice President
Kelly Sparks, Associate Vice President for Finance and Strategic Planning
Julie Gess-Newsome, Dean of Academic Affairs
Blair Garland, Senior Director of Community Relations and Marketing
Julie Hotchkiss, Director of Development
Brittany Preston, Director of Admissions and Recruitment
Jane Reynolds, Director of Enrollment Services and Student Success

Summary

Vision
Oregon State University-Cascades will be a high-quality, comprehensive four-year university and major contributor to the vitality of the unique Central Oregon community and environment. OSU-Cascades will be a destination of choice for students, faculty and staff seeking teaching and research excellence within a dynamic, inclusive and student-centered campus community.
**Mission**
As a campus of Oregon’s leading public research university, OSU-Cascades provides globally relevant education, research and outreach. Its students develop the knowledge and critical thinking ability to lead informed lives, serve their communities and enhance their careers. OSU-Cascades is committed to the diversity and sustainability of the campus and surrounding communities.

**Values**
The guiding ethos of OSU-Cascades is to contribute significantly to the intellectual, cultural, ecological, social and economic vitality of Central Oregon. To achieve that goal, the OSU-Cascades community will model principles and practices of a thriving, equitable and sustainable society. A culture of learning and exploration provides significant rewards to its members; those rewards are best achieved when all community members — faculty, staff, administrators, students and advocacy and advisory boards — honor the following principles:

- Respect the dignity and uniqueness of individuals. This principle applies to a diversity of cultures, belief systems, academic ranks and academic/professional disciplines.
- Aspire to excellence and integrity in every endeavor.
- Consider current and future generations in every deliberation.
- Demonstrate leadership in service to community.

**Signature Areas**
OSU-Cascades’ strategic plan reaffirms the commitment to three signature areas that draw from disciplines across the university and integrate research, engagement and teaching. The role of land grant universities in the 21st century will evolve from a primary focus of providing information to individual stakeholders for private consumption to include a broader focus of informing society as a whole. This broader focus will inform decisions and policies that will lead to responsible stewardship of environmental and social systems, locally and globally. The university’s long-standing connections with communities and institutions beyond campus borders enhance its ability to communicate discovery and research.

1. **Innovation and Creativity**
   a. OSU-Cascades embraces innovation, creativity and critical thinking as essential to life success in a world where change is the only constant. OSU-Cascades will build upon an entrepreneurial culture, lead with cross-disciplinary thinking and generate new ideas that ultimately result in discovery and solutions to contemporary world problems.
   b. OSU-Cascades will become a conduit for the creative arts in Central Oregon, setting a high-quality standard and embracing artistic risk-taking. The university will elevate the regional arts conversation.

2. **Health and Wellness**
   a. The OSU-Cascades community promotes and embodies wellness. The campus, curricula and culture empower and inspire students and staff to make choices that facilitate personal health and contribute to the collective well-being of the community. The campus is regarded as an innovator in human health and wellness through interdisciplinary research and programming,
in collaboration with local, national and international partners. Students and staff leave campus healthier than when they arrive.

3. Sustainability and Resilience
   a. OSU-Cascades will demonstrate an unwavering commitment to shaping a future that is socially, economically and ecologically sustainable and resilient. The campus will build sustainability and resiliency into its academic programs, internal operating procedures, built environment and culture.

Strategic Plan
OSU-Cascades’ goals are aligned with the goals of the OSU Strategic Plan. In addition, OSU-Cascades has a goal to build out the campus to serve the educational needs of Central Oregon.

Goal 1: Envision, design and build a campus serving Central Oregon and beyond.
   • Launch new academic programs that support regional needs, build on Central Oregon Community College (COCC) offerings, are attractive to students and prepare students to contribute wherever they choose to work.
   • Establish a residential campus that embraces sustainability and resilience, health and wellness and innovation and creativity.
   • Leverage the built and natural environments as living laboratories.
   • Knit the campus into the fabric of the community.
   • Create a collaborative and inclusive culture that values diversity.

Goal 2: Provide a transformational educational experience for all learners.
   • Implement a progressive educational experience that is built on a foundation of both knowledge and skills that are systematically applied to real-life problems.
   • Ensure 100 percent of students engage in a high-impact learning experience, such as study abroad, internships, undergraduate research, service learning or leadership.
   • Implement cutting-edge pedagogy that addresses all learning styles.
   • Create an integrated student support environment that raises and equalizes retention and success of all learners.

Goal 3: Demonstrate leadership in research, scholarship and creativity while enhancing preeminence in OSU-Cascades’ three signature areas: innovation and creativity, health and wellness, and sustainability and resilience.
   • Increase undergraduate engagement in scholarship that supports faculty research agendas.
   • Leverage the interdisciplinary culture to foster innovative research partnerships.
   • Strengthen and expand regional, national and international partnerships to advance research opportunities that address real-world issues.
   • Broaden internal support for faculty research and scholarship.

Goal 4: Strengthen impact and reach throughout Oregon and beyond.
   • Enhance partnerships with businesses, nonprofits, school districts, higher education and government entities that support the region’s priorities.
• Empower OSU alumni and OSU-Cascades students, faculty, staff and alumni to be engaged citizens in Central Oregon to transform knowledge into action for the benefit of communities.
• Enrich the intellectual and cultural vitality of the region through programming and events.
• Provide public, multiuse spaces to enhance collaboration with community partners, with attention to cultural and intellectual value.

View the Strategic Plan for OSU-Cascades.

**Annual Report**

View the [2017-18 Annual Report](#) for OSU-Cascades.

**OSU LIBRARIES**

**Leadership**

- Faye A. Chadwell, University Librarian and Director, OSU Press
- Anne-Marie Deitering, Associate University Librarian for Learning Services
- Cheryl Middleton, Associate University Librarian for Research and Scholarly Communication
- Beth Filar-Williams, Head, Library Experience and Access
- Kerri Goergen-Doll, Director, Resources Acquisitions and Sharing
- Larry Landis, Director, Special Collections and Archives Research Center
- Mary Markland, Director, Guin Library
- Margaret Mellinger, Head, Emerging Technologies and Services
- Jane Nichols, Head, Teaching and Engagement

**Division Summary**

**Major Focus**

OSU Libraries represents the second-largest research library in the state. Primary locations include the Valley Library at the main campus in Corvallis and the Marilyn Potts Guin Library at the Hatfield Marine Science Center in Newport. Two additional libraries support OSU students and researchers: the OSU-Cascades Library housed in Tykson Hall, serving the OSU campus in Bend, and the McDowell Veterinary Medicine Library at the Carlson College of Veterinary Medicine on the Corvallis campus. The OSU Press has been a department within the OSU Libraries since June 2007. OSU Libraries and Press advances the university’s teaching, research and engagement mission by:

- Providing excellent library spaces, collections and services for users at their point of need.
- Using unique expertise as library and publishing professionals to bridge gaps between disciplines and create partnerships across organizational boundaries.
- Supporting the discovery, creation and preservation of knowledge to inspire learning and foster success for all communities.
- Pursuing equity, diversity and inclusion in practices, organizational development and service design and implementation.
Services Provided

- The Special Collections and Archives Research Center stimulates and enriches the research and teaching endeavors of Oregon State University through primary sources. As the repository for and steward of the libraries’ rare and unique materials, the center builds distinctive and unique collections in its signature areas: natural resources, the history of science, university history and Oregon’s multicultural communities.

- For nearly 60 years, the OSU Press has served as the university’s book-publishing arm, annually producing 18 to 22 books for scholars and general readers about Pacific Northwest history, natural history, cultures and literature, as well as works dealing with environmental history and natural resource management.

- Resource Acquisitions and Sharing brings together user-centered collection services — including acquisitions, cataloging, collection development, resource sharing and collection maintenance — to provide discovery and access to the information library users need for learning, teaching and research.

- The Teaching and Engagement department makes the library useful and usable by inspiring enthusiasm for information, learning and research; by advocating for users; and by connecting community members with information in the library and beyond.

- Emerging Technologies and Services monitors trends and new technologies and leads the development and support of the IT infrastructure and online environment for OSU Libraries.

- The Marilyn Potts Guin Library encompasses multifaceted library operations, collections and services that support the Hatfield Marine Science Center’s research, outreach and teaching mission.

- The Library Experience and Access department meets evolving needs with access to user-focused, proactive and flexible services and spaces that enrich learning, teaching and research.

- Library Administration provides leadership in strategic planning, resource and personnel management, organizational development, financial administration and advancement, and directs the overall operations of OSU Libraries and Press.

RESEARCH OFFICE

Leadership

Irem Tumer, Interim Vice President, Research
Staci Simonich, Associate Vice President, Research
Brian Wall, Assistant Vice President, Commercialization and Industry Partnerships
Anita Eisenstadt, Assistant Vice President, Research Integrity
Patricia Hawk, Assistant Vice President, Sponsored Research and Award Administration
Jennifer Creighton, Fiscal Director

Office Summary

Mission

Oregon State University is entrusted to build a future that’s smarter, healthier, more prosperous and more just. Research is foundational to that vision. Research provides transformational educational experiences for students, intellectual challenges for faculty and a means to broaden OSU’s impact throughout the
world. The mission of the Research Office is to ensure that its research investments are sound, that researchers are well equipped to advance their fields of study, and that the work of faculty, students and staff has impacts in Oregon and beyond.

**Vision**
The Research Office envisions a research enterprise that’s fully integrated in the communities it serves, that’s driven by a fundamental quest for knowledge, that inspires creativity and innovation and that’s renowned for delivering outcomes that matter.

**Values**
The Research Office welcomes opposing opinions, invites a diversity of perspectives, advocates transparency in all aspects of its business and creates a community of care and respect.

**Major Focus**
- Guides faculty inquiry in OSU’s three signature areas:
  - Advancing the science of sustainable Earth ecosystems.
  - Improving human health and wellness.
  - Promoting economic growth and social progress.

**Services Provided**
- The Office for Commercialization and Corporate Development (OCCD) supports research development and commercialization of university intellectual property, focusing on the protection and transfer of intellectual property through license, confidentiality and material transfer agreements. OCCD acts as the bridge between researchers and commercial entities, from Oregon-based startups to large international companies.
- The Office of Research Integrity (ORI) ensures compliance with ethical and legal responsibilities in research involving animal care and use, biosafety, chemical safety, scientific diving and boating, radiation safety and conflict of interest. ORI includes the Animal Care and Use Committee (IACUC), Institutional Review Board (IRB), Conflict of Interest (COI), Scientific Boating and Scientific Diving.
- The Office for Sponsored Research and Award Administration (OSRAA) is responsible for proposal submission for sponsored research, scholarship, instructional and other activities, and research compliance as it relates to sponsored activities. Functions include proposal review, monitoring institutional compliance with terms and conditions, official institutional signatory, policy and procedure development, training, compliance activities related to research administration and general funding opportunity assistance.
- Incentive Programs manages internal funding for research seeding, emergencies, time releases, equipment and student involvement, and coordination of limited submission opportunities.
- Research centers and institutes in OSU colleges encompass a transdisciplinary approach to addressing the world’s pressing issues. OSU researchers collaborate to advance the science of sustainable Earth ecosystems, improve human health and wellness and promote economic growth and social progress.
Strategic Plan

1. Secure new revenue to advance the research mission.
   a. Aggressively negotiate the shared costs of federal research (F&A rate).
   b. Pursue nontraditional sources of research funding (industry, business, foundation) to support mission-critical research.
   c. Simplify the processes of setting fees and collecting revenue for services.

2. Modernize research infrastructure and business processes.
   a. Improve the efficiency and transparency of business operations and generate an atmosphere of client service throughout the Research Office.
   b. Renovate, rent or build quality research space for OSU scientists and engineers.
   c. Invent administrative solutions to the high costs of graduate students and post-docs.

3. Leverage partnerships to broaden the impact of university research.
   a. Work with federal labs to establish joint programs for students, post-doctoral fellows and faculty.
   b. Increase the involvement of industry and business in university research.
   c. Strengthen collaborations with Portland research universities and industries.
   d. Align research priorities and innovation programs of OSU with state development agencies to translate research outcomes into economic impact.

4. Take research to the communities that need it.
   a. Create a venue where university and industry researchers collaborate on technical advances and market innovations.
   b. Reward university researchers for driving technological innovation and moving those technologies to market.
   c. Capitalize on OSU’s statewide presence to engage Oregon’s communities in research.
   d. Accelerate efforts to communicate research, innovation and their benefits.

5. Build a global reputation that communicates the university’s accomplishments and conveys its culture.
   a. Grow the culture of research and innovation within OSU.
   b. Engage top talent from business, industry and governmental agencies to serve on advisory boards for major research initiatives.
   c. Systematically promote researchers for awards and national recognition.

View the Strategic Plan for the Research Office.
DIVISION OF STUDENT AFFAIRS

Leadership

Dan Larson, Interim Vice Provost, Student Affairs
Kevin Dougherty, Associate Provost and Dean of Students
Jesse Nelson, Associate Provost, Academic Achievement
Steve Hoelscher, Interim Associate Provost, Operations
Damoni Wright, Executive Director, Student Experience and Engagement
Stephen Jenkins, Interim Executive Director, University Housing and Dining Services
Leah Hall Dorothy, Director, Recreational Sports
Maureen Cochran, Director, Student Affairs Assessment
Jenny Haubenreiser, Executive Director, Student Health Services
Carolyn Boyd, Director, Communications and Marketing
Brandi Fuhrman, Executive Director, Career Development
Ian Kellems, Director, Counseling and Psychological Services
Deb Mott, Interim Senior Director, Memorial Union

Division Summary

Mission
The Division of Student Affairs enhances learning and strengthens the educational experience of Oregon State University students. In six domains of learning and service, the division impacts students’ health and well-being, fosters global awareness and empathy, cultivates academic success through advising and support services, guides students in their career exploration and creates leaders who are engaged citizens.

Vision
Everything is student-centered. Whether it is providing academic support services such as advising, creating enriching campus housing environments, or guiding students as they engage in community activism, the division seeks to create well-rounded, empowering college experiences that foster student persistence and development.

Priorities
The division priorities serve the drive to help students succeed academically, persist on their educational paths and graduate with the skills they need to enter their professional lives with confidence. The strategic plan shapes how the division pursues these priorities and guides efforts to promote student success.

• Persistence: The division facilitates both academic progress and student well-being in support of success. Student affairs programming helps students feel capable in the classroom and embraced by the community so that they are ready to return to campus each year.

• Degree Completion: Programs and services provide not just involvement, but also true community, purpose, self-efficacy and a strong sense of belonging — all crucial for student retention through graduation.
• Advancement: Events and services such as job shadowing, career fairs, interview training and internship opportunities — alongside the leadership and professional skills gained from campus involvement — allow students to enter the professional world or pursue graduate school with confidence, self-assurance and practical experience.

Services Provided

• The Office of Academic Achievement uses academic support services, first-year programming, academic advising and other services to increase and equalize student success, support retention, help students graduate and foster the holistic development of students. Offices include: Academics for Student Athletes, Academic Success Center, Advancing Academic Equity for Student Success, College Assistance Migrant Program, Cross-Campus Strategic Initiatives, Educational Opportunities Program, Office of International Services, New Student Programs and Family Outreach, TRIO Student Support Services, University Exploratory Studies Program and The Writing Center.

• Counseling and Psychological Services (CAPS) helps students address the challenges and difficulties they face. These services are designed to help students understand themselves better, create and maintain satisfying relationships, improve their academic performance and make healthy and satisfying career and life choices. The office provides brief counseling services, or makes referrals to health care providers in the community if more intensive or specialized care is needed.

• The Career Development Center provides high-quality, comprehensive professional development to all students to prepare them for successful careers in an evolving global community. The center cultivates a career-conscious campus and espouses the values of excellence, inclusivity, innovation, continuous learning, collaboration and integrity.

• Student Affairs Communications and Marketing serves the Office of the Vice Provost for Student Affairs by creating and coordinating timely communications on behalf of the vice provost, supporting division-wide projects, and working with division and university partners to establish consistent branding and efficient practices. This office supports the marketing needs of the centrally-funded units within the division, including the Office of Student Life, Office of Academic Achievement and Career Development Center.

• Student Experiences and Engagement (SEE) seeks to develop and enhance the student experience by providing opportunities for leadership development, civic engagement and campus community building. SEE serves as the heart of campus involvement. It’s a place to get connected, to find purpose and belonging through active learning experiences and meaningful relationships. SEE provides opportunities for students to discover their passions, spark their creativity, pursue social justice and work together to change the world. From the moment students arrive until they graduate, the center prepares students to build caring, vibrant, welcoming communities both on campus and beyond. The departments that make up SEE include: Craft Center, Diversity and Cultural Engagement, Orange Media Network and Student Leadership and Involvement (which includes the Center for Civic Engagement, Sustainability Initiative, Global Community Kitchen, Student Clubs and Organizations, SORCE, OSU Program Council, and Leadership Development).

• University Housing and Dining Services (UHDS) provides living-learning environments and contributes to the intellectual climate of the campus through its programs and services in residence halls, the family housing community and the dining centers. These are based on a strategic goal focused on student success and development.

• Student Affairs Assessment is responsible for the coordination of assessment efforts within the Division of Student Affairs. This includes partnering with units both within the Division of Student
Affairs and in other divisions/departments; cataloging and disseminating assessment information collected in the Division of Student Affairs; making information available to various constituencies; facilitating data requests from the division and coordinating the Student Affairs Assessment Council.

- Office of Student Life provides educational and developmental opportunities for students to make informed decisions that support their success at OSU. It provides an environment that enables and champions the value of strengthening OSU as a community where students can experience and pursue success. Units in this area include: ASOSU Office of Student Governance, Center for Fraternity and Sorority Life, Community Responsibility and Belonging, Disability Access Services, Human Services Resource Center, Military and Veteran Resources, Office of Advocacy, Student Care, Student Conduct and Community Standards.

- Student Health Services (SHS) provides comprehensive health and wellness services to enhance student success and well-being. SHS serves as the primary health care provider for OSU students and it also provides public health support and response, mental health care, advocacy services, prevention and wellness programming and access to affordable insurance plans. SHS works in close collaboration with campus and community partners to ensure access to student-centered care while also creating campus environments that are conducive to health, safety and well-being. SHS has multiple locations on the OSU campus and houses the OSU Pharmacy, which is administered by the College of Pharmacy.

- The Department of Recreational Sports provides an extensive and diverse list of sport, fitness and adventure opportunities to serve the varied recreation preferences and activity interests of the campus community. It is the department’s mission to support student success by providing quality recreational and educational opportunities that inspire healthy living.

- The Memorial Union (MU) is the campus student union. The MU supports the campus community and student growth by providing gathering spaces for formal and informal community interactions that build meaningful relationships. Services are provided by partnerships with OSU departments, including University Housing and Dining Services, Printing and Mailing, the ID Center and Counseling and Psychological Services. The MU supports student fee-funded facilities with facility management such as project coordination, custodial and maintenance. The organization enjoys a robust student employment program that provides opportunities for personal growth in customer service, teamwork, leadership and critical thinking skills. The MU is an auxiliary that relies on student fee funding and revenue from events, services, leases and other sources.

**Strategic Plan**

Achieving the ultimate in student success — graduates who change the world for the better — takes an entire campus community, and the Division of Student Affairs is a leader in that community committed to advancing student success. The division takes an innovative and holistic approach to providing a quality educational experience for all students at OSU. Created in collaboration with university partners, this strategic plan serves as a map and compass through 2020. It inspires the division to meet students where they are and help them get to where they want to go. Done right, the impact the division has on student success lasts a lifetime, and graduates go on to illuminate and transform the world in extraordinary ways.

**Goal 1: Transformative Learning**

Innovate and advance inclusive, transformative learning that promotes student success throughout the college career and prepares and inspires all graduates to thrive in a global society.
Strategies:

- Define key transferable skills that students gain through aligned, division-wide programming that enhance professional development and personal enrichment.
- Design personalized student learning and services through the strategic use of innovative technologies.
- Develop cocurricular programming aligned throughout the division and with university partners that is grounded in the student affairs domains of learning and service and provides a path and trajectory for students to build skills incrementally and engage in cumulative, deep learning.
- Leverage data to promote access, inclusion and strong student success outcomes.

Goal 2: Community and Belonging

Foster an inclusive campus community that facilitates learning across identities and affinities and creates a shared sense of connection, belonging and social responsibility.

Strategies:

- Create community-building campus traditions that are inclusive and advance civic engagement and social responsibility as the community ethos.
- Advance transformative student learning experiences throughout the division that build shared understandings and interactions between identities and affinities.
- Utilize technology in ways to build virtual communities or provide pathways to communities or affinities of interest.

Goal 3: Well-Being

Advance programs and services that promote behaviors, attitudes and environments that contribute to health and a culture of well-being at OSU.

Strategies:

- Embed health and wellness into institutional policies, departmental operations and business practices utilizing national benchmarks and standardized health assessment measures.
- Institutionalize evidence-informed prevention programs, practices and services for high-risk substance use, violence and suicide that impact students and their living and learning communities and involve faculty, staff and campus administration.

Goal 4: Resource Stewardship

Collectively contribute to responsible resource stewardship and the pursuit of new funding possibilities to increase access to programs and services that positively impact student success.

Strategies:

- Increase regular assessment of programs and services to ensure expenditures are achieving the desired impact of advancing student success and supporting development of stronger cross-divisional alignments with the domains of learning and service.
- Develop a comprehensive fundraising platform for the Division of Student Affairs.
Goal 5: Professional Learning

Provide professional learning opportunities that will inspire, empower and prepare all Division of Student Affairs staff to contribute to the advancement of the strategic goals and the success of all students.

Strategies:

• Provide the division with a professional development framework that incorporates evidence-informed practices and embodies the spirit of inspiration and empowerment.

• Develop a dynamic division-wide learning agenda that prepares and supports staff to effectively advance the goals of the strategic plan.

View the Strategic Plan for the Division of Student Affairs.

Annual Report

View the 2017-18 Annual Report for the Division of Student Affairs.

OFFICE OF UNDERGRADUATE EDUCATION

Leadership

Alix Gitelman, Vice Provost, Undergraduate Education
Julie Greenwood, Associate Provost, Transformative Learning
Janine Trempy, Associate Provost, Academic Programs and Assessment
Caine Francis, Director, OSU GO

Office Summary

Mission

Oregon State University’s graduates are its greatest contribution to society. More than ever, students are seeking a high-quality education that will provide them with the skills and preparation necessary to succeed in the workforce and become engaged, socially conscious citizens of the communities where they will live and serve. To this end, the Office of Undergraduate Education has a mission to advance the university’s goals of offering high-quality undergraduate programs on-site, online and in hybrid formats; design diverse, well-supported and affordable pathways to an OSU degree; create more opportunities for student research and experiential learning; and deliver instruction using leading-edge pedagogies and technologies. These activities are critical underpinnings of student success.

High-Quality Educational Programs

Program and curriculum planning, development and assessment are key to providing a high-quality education for all students. OSU’s offerings provide both a solid foundation of knowledge as well as the specialized skills and expertise necessary to meaningfully engage in an ever-changing world. Undergraduate education supports strategic planning of programs and curricular offerings coupled with consistent and systematic assessment. This full-cycle process ensures the high quality of the university’s academic programs and the high value of the credentials offered to graduates.
Transformational Educational Experiences

Strategic use of learning innovation is at the core of providing all students with transformational academic experiences. The office supports faculty in the integration of technology, high-impact practices, experiential learning and innovative pedagogical approaches to advance teaching and learning across the institution. Providing consistent and easy-to-access resources for faculty support in this area will advance OSU's learning ecosystem across all modalities of teaching and learning.

Through cross-campus partnerships and collaboration, the office supports and advances OSU's student success goals to improve and equalize graduation rates. The office also supports faculty in their pursuit of teaching excellence and learning innovation.

DIVISION OF UNIVERSITY OUTREACH AND ENGAGEMENT

Leadership

Scott Reed, Vice Provost, University Outreach and Engagement; Director, OSU Extension Service
Linsey Shirley, Associate Provost, University Outreach and Engagement; Associate Director, OSU Extension Service
Jennifer Alexander, Director, Extension and Experiment Station Communications
Kris Elliott, Assistant Director, OSU Extension Service; Outdoor School Program Leader
Ana Lu Fonseca, Assistant Director, Diversity, Equity and Inclusion, OSU Extension Service,
Jeff Sherman, Assistant Director, Strategic Innovation, OSU Extension Service; OSU Open Campus Program Leader

Division Summary

Vision
The life of each person engaged will be demonstrably improved and enriched by access to and co-creation of innovation, knowledge and expertise.

Mission
Outreach and Engagement at Oregon State University enhances access to enrichment and problem solving through reciprocal relationships for the exchange of knowledge and resources in partnership with individuals, communities, businesses, industries, government and educational institutions.

Values
• Learner-centered approach: The division engages collaboratively with diverse learners and stakeholders and adapts to meet their needs.
• Innovation: The division embraces creativity, as well as new methods, ideas and products to improve the services provided.
• Integrity: The division is responsible, ethical and accountable for its actions.
• Diversity: The division embraces and advocates for diversity, equity, inclusion and social justice.
• Knowledge: The division uses research-based, community-generated and indigenous knowledge to guide decisions, practices and actions.
• Healthy work environment: The division values faculty and staff and believes all deserve an empowering, supportive and caring environment.

• Social responsibility: The division contributes to society’s well-being and intellectual, cultural and economic progress.

**Major Focus**

The Division of University Outreach and Engagement, which includes the OSU Extension Service, OSU Open Campus, Outdoor School and Professional and Continuing Education, connects Oregon State University to the rest of the world by making its educational programs accessible wherever and whenever people need to learn. Outreach and Engagement enhances access to enrichment and problem-solving through reciprocal relationships for the exchange of knowledge and resources in partnership with individuals, communities, businesses, industries, government and educational institutions.

**Services Provided**

• The OSU Extension Service engages the people of Oregon with research-based knowledge and education that strengthens communities and economies, sustains natural resources and promotes healthy families and individuals. It extends the research and knowledge bases of the university to people who need the information and provides leadership in applying this knowledge to the current and emerging issues and needs identified by Oregonians and their communities. Anyone may participate in Extension offerings. Thousands of Oregon citizens volunteer to assist in Extension programs by leading and teaching groups, responding to questions and providing educational information. OSU students support their communities, gain practical experience and learn through Extension placements, applying academic learning to address local community needs. About two-thirds of OSU’s Extension faculty and staff are located off campus. Financial support is from county, state and federal governments, plus grants and other sources. The OSU Extension Service has a presence in all 36 Oregon counties and delivers programs in agriculture and natural resources, family and community health, forestry and natural resources, Sea Grant and 4-H youth development. Extension educational programs are developed in response to the needs of people in Oregon. Extension’s expertise and programming in these areas have a direct impact on Oregon’s economy and the lives of Oregonians.

• OSU Open Campus is a community-based education partnership that provides local access to learning to address the unique educational needs of Oregon’s communities. Through a statewide network of Open Campus education coordinators, working in partnership with community colleges, regional economic development groups, K-12 schools, the business community and local governments, the university delivers education to underserved and place-bound Oregonians. This program builds on the foundation of the OSU Extension Service, providing an expanded way to access the university’s resources. OSU Open Campus focuses on three main goals: college and career readiness, degree completion and economic and community development.

• The OSU Extension Service is the institutional home of Oregon’s statewide Outdoor School program and holds fiscal, programmatic and administrative responsibility for the program. In July 2017, the Oregon Legislature formally approved the budget appropriation for the statewide Outdoor School program during the next two years. This followed Oregon voters’ approval of Ballot Measure 99 in November 2016, which designated funding and adoption of Senate Bill 439, codified into law as Oregon Revised Statute ORS327.390, by the Oregon Legislature. Together, these statutes directed OSU Extension to assist school districts and education service districts in providing a statewide Outdoor School program. OSU Extension provides logistical support, curricular resources, program
evaluation, equity and inclusion support and professional development opportunities in addition to funding for local districts' Outdoor School costs through state-appropriated Oregon Lottery funds.

- Professional and Continuing Education (PACE) provides continuing education and training for professionals, organizations, associations and K–12 students throughout the state and beyond. PACE works with OSU partners and colleges, businesses, associations and government agencies to develop new on-site and online educational offerings in formats that include workshops, webinars, short courses, conferences and certificate programs. Services include instructional design and program development for specific audiences, as well as enrollment management, customer relationship management, event management and marketing.

**Strategic Plan**

The Division of Outreach and Engagement has identified five goals for the next five years. To make progress on all five the division recognizes that it must gather and invest resources to support work in these areas and must regularly conduct assessments and evaluations to confirm progress. In addition, all division employees must have the necessary core competencies to work in these goal areas, and the division will recognize, reward and celebrate the contributions of individuals, teams, programs and units as they make progress toward goal achievement.

**GOAL 1: Enhance the culture and impact of Oregon State University.**

Specifically, the goals are to integrate outreach and engagement throughout all departments in the university; create, enhance and support partnerships within and beyond the university; provide transformative experiences for all learners and communities; and contribute in measurable ways to OSU's signature areas: sustainable Earth ecosystems, human health and wellness, and economic growth and social progress.

Strategies:

1. Align recruitment, incentive and appointment practices with division goals and values.
2. Make Oregon State University known as a partner and resource to meet community needs.
3. Provide highly relevant, demand-driven opportunities to learners and communities.
4. Regularly communicate the significance of the division and its contribution to the land grant mission and OSU's signature areas.

**GOAL 2: Equitably serve a broad diversity of learners, communities and stakeholders.**

Specifically, the goals are to expand capacity to effectively serve new and historically underrepresented learners, communities and stakeholders; learn both from and with diverse populations and communities to identify and address the challenges they face; create and deliver educational experiences to equitably serve diverse populations and communities; and provide multiple and varied ways for people to access education, research and information.

Strategies:

1. Identify the new and historically underrepresented learners, communities and stakeholders the division will serve.
2. Institutionalize and regularly conduct community and learner needs assessments.
3. Align hiring, retention and performance evaluation policies and practices with this goal.
4. Expand and leverage partnerships to reach underserved audiences.
5. Develop culturally appropriate content and delivery mechanisms.

**GOAL 3: Increase community and learner engagement.**

Specifically, the goals are to learn from and collaborate with people and communities to build relationships and create synergy; create, apply and share knowledge, ideas and resources through mutually beneficial and reciprocal exchange with communities and learners; and cultivate environments where learners can deeply connect with the content and with each other to increase their curiosity, interest, knowledge and bond to learning.

Strategies:
1. Create and leverage partnerships.
2. Adapt to meet new community and learner needs.
3. Use learning communities, technology and social media, as well as interactive, hands-on, field-based, experiential, hybrid and discussion-based approaches for teaching, learning and relationship building.

**GOAL 4: Be broadly recognized for the division’s impacts and as a resource.**

Specifically, goals are to be recognized for the division’s achievements and the impact of its work; and be recognized as a leading resource for teaching and learning, as well as research-based, academic and applied knowledge.

Strategies:
1. Continue high-quality, impactful work.
2. Diversify external marketing strategies.
3. Internally market expertise, impact and achievements.

**GOAL 5: Have a supportive workplace culture.**

Specifically, goals are to build and maintain a work environment where people can be healthy, proud and happy to work; share commitment to the mission, vision, values and goals of the division; invest resources in outreach and engagement efforts that advance the division’s mission, vision and values; be an organization composed of people with varied identities, experiences, perspectives and types of expertise; create and sustain an equitable and inclusive organizational culture; and encourage and support professional development, creativity, innovation and work-life balance.

Strategies:
1. Develop and support equitable human resource policies and practices, including those related to wages, hiring, retention, performance evaluation, professional development and work arrangements.
2. Foster transparency in decision-making.
3. Encourage dialogue and interactive communication across the division that advances understanding of individual diversity and organizational culture.
4. Be responsive to issues, ideas and concerns of colleagues.
View the Strategic Plan for the Division of University Outreach and Engagement.

Annual Report
View the 2017-18 Annual Report for the Division of University Outreach and Engagement.

DIVISION OF UNIVERSITY RELATIONS AND MARKETING

Leadership

Steven Clark, Vice President, University Relations and Marketing
Annie Heck, Associate Vice President, University Relations and Marketing
Melody Oldfield, Assistant Vice President, University Marketing
Shelly Signs, Director, University Events
Sean Nealon, Director, News and Research Communications
David Baker, Director, Oregon State Productions
Judy Bankson, Assistant Director — Production, Printing and Mailing Services
Jeff Todd, Internal Client Relations and Business Development Manager, Printing and Mailing Services
Donna Williams, Associate Director, Conference Services
Tina Green-Price, Associate Director, The LaSells Stewart Center

Division Summary

The Division of University Relations and Marketing (URM) is Oregon State University’s central communications organization. Its responsibilities include oversight and management of the university’s web presence, media relations, research communications, marketing and advertising, and events management, including presidential-level events. Additionally, the vice president for University Relations and Marketing serves as a liaison to the OSU Foundation and its Board of Governors and Trustees, and to the OSU Alumni Association Board of Directors.

Services Provided

• Conference Services supports faculty and staff by developing and producing conferences and workshops that showcase the academic and research mission of the university.

• The LaSells Stewart Center serves Oregon State University and the Corvallis community as a dedicated space for the performing arts, conferences and lectures. It also features the largest art gallery in the Willamette Valley, allowing endless potential to host all types of events.

• News and Research Communications is OSU’s primary office for media relations and campus communications. The office includes seven communications professionals whose responsibilities range from writing news releases and interacting with external media to editing OSU Today and LIFE@OSU to producing Terra, OSU’s research magazine.

• Oregon State Productions creates multimedia content for the university, including commercials, feature-length documentaries, broadcast television footage and shareable content for the web.

• Printing and Mailing Services uses the latest technology to support the marketing and promotion of university programs and initiatives.
• University Events plans and implements high-impact events, bringing people together to communicate and advance Oregon State University’s mission, goals and strategic vision. It offers support and guidance to the OSU community ranging from full-service event planning to answering protocol questions and offering systems for event success.

• University Marketing provides professional marketing and creative services to help clients successfully promote their college, department, program or event. On the marketing side, the office assists with planning, advertising, market research, direct mail and more. On the creative side, the office offers concept development, graphic design and copywriting. University Marketing also manages OSU’s trademark licensing program.

Strategic Plan

University Relations and Marketing supports Oregon State University’s mission and strategic plan by managing overall university branding, marketing, media relations, news communications, public affairs, executive communications and crisis communications.

URM works throughout the university to plan and implement strategic efforts within its core areas of responsibility; collaborate with OSU’s colleges and units to support their success; maximize expenditures and savings of public funds; govern the university’s brand and help guide the sub-brands of various OSU colleges and units.

URM is aligned around three foundational core pillars:

• Support OSU’s mission and strategic plan by providing the university, OSU partners and URM clients with aligned and integrated branded marketing, communications and public affairs services.

• Serve the university’s values by providing socially just and inclusive marketing, communications and public affairs.

• Support and serve the university and clients with exceptional client and partner services and account management.

URM works to help advance the university’s goals articulated in SP3.0 related to undergraduate retention and graduation rates; the increased diversity of faculty, staff and students; enhanced preeminence of OSU’s signature areas and strengthened impact and reach of OSU throughout the world.

Going forward, expanded areas of emphasis will more fully include:

• Promoting faculty excellence.

• Enhancing knowledge of OSU’s research excellence and impact beyond Oregon.

• Supporting increased nonresident and underrepresented student enrollment marketing.
TRANSFORMATION, EXCELLENCE AND IMPACT

STRATEGIC PLAN 4.0
2019-2023
EXECUTIVE SUMMARY

We began our development of Oregon State University’s fourth strategic plan with a visioning exercise that sought to anticipate OSU’s unique contributions on the higher education landscape in the year 2030. That effort assessed what we have accomplished since the launch of our first plan in 2004, refined areas of strategic focus based on changing trends and needs in Oregon and in higher education broadly, and inventoried and evaluated opportunities and challenges. The result is a set of distinctive strengths we aspire to have achieved by the year 2030 (see pages 6-9). SP4.0 identifies four goals and twenty actions that will drive us closer to achieving those distinctions.

A lot has changed over the 15-year span of strategic planning at OSU, and over the university’s 150 years as the state’s official land-grant institution. However, our commitment to engaging in exceptional research, discovery, innovation and engagement—and to integrating that research and engagement mission with the delivery of a high quality, globally relevant and affordable education for the people of our state and beyond—remains steadfast.

We are acutely aware of the intersecting implications of the tangible benefits of a college degree for economic mobility, of the inequity of access to higher education nationally and internationally, and of disparities in completion rates among students of different backgrounds and incomes. We know that the need for research and innovation to address humanity’s greatest challenges is greater than ever. Yet, we are cognizant that some in America today are questioning the value of higher education, research, and science.

In the face of those trends, we are even more committed to the ideal that higher education is a public good and that education of the kind we provide, as a research-intensive land-grant institution with the leading scholars and infrastructure capable of exerting global impact, is uniquely important and should be accessible to all learners, not only a narrow elite.

Having concluded OSU150, SP4.0: Transformation, Excellence and Impact, guides Oregon State University as we lay the groundwork for success over the next 150 years.

Edward J. Ray
President
Oregon State University
MISSION, VISION AND COMMITMENTS

WHAT WE DO

Building on 150 years as Oregon’s land grant institution, Oregon State University serves the state, the nation and the world as a premier 21st-century research university.

MISSION—As a land grant institution committed to teaching, research, and outreach and engagement, Oregon State University promotes economic, social, cultural, and environmental progress for the people of Oregon, the nation, and the world.

We accomplish this by:

• Producing skilled graduates who are critical thinkers;
• Searching actively for new knowledge and solutions;
• Developing the next generation of scholars;
• Collaborating with communities in Oregon and around the world; and
• Maintaining a rigorous focus on academic excellence, particularly in three signature areas: the science of sustainable earth ecosystems, health and wellness, and economic prosperity and social progress.
OUR DESTINATION

We are distinct among all other universities in how we pursue our mission. In ways that are highly synergistic, we conduct basic and applied research, deliver undergraduate and graduate education, pursue innovation and economic development, and engage communities in mutual learning and problem solving. We pursue research, teaching and engagement activities leverage each effort to achieve far-reaching results. And mutually support each other.

VISION—Leadership among land grant universities in the integrated creation, sharing and application of knowledge for the betterment of humankind.

In this way, we produce graduates, scholarship and solutions that achieve maximum positive impact on humanity’s greatest challenges.
OUR COMMITMENTS

The foundational pursuits of research preeminence, innovation, transformative education, outreach and engagement, global impact, access, affordability, diversity, inclusion and justice underpin Oregon State University’s mission and vision; guide our priorities and actions; and are visible in our achievements. Inclusive academic excellence is our north star. We execute our mission and pursue our vision while remaining true to the following commitments.

With our students, we will innovate and collaborate in research to drive solutions. Our students will innovate with us as we pursue discoveries that are engines for improving society, the economy, and our planet. In this way, we will support a new generation of creative problem solvers committed to critical thinking, evidence, and sound analysis. We will foster collaborations across OSU disciplines, with other institutions, the communities we serve, and with industry to solve complex problems. We will nurture our robust culture of collaboration and interdisciplinary scholarship as something that makes us distinctive among top research universities. We will be a true community of new and seasoned scholars.

We will offer excellent education for all learners. We will serve learners in Oregon and across the world by offering high quality, relevant, and affordable academic credentials. We will innovate in providing educational access through varied campus, online, and outreach-based programs. We will collaborate proactively with community colleges and others to improve pathways for all learners.

We will be leaders in the delivery of education. We will be creative in the development of pedagogies and delivery modes, especially digital and hybrid learning technologies and approaches. We will engage students in research and experiential learning. We will provide graduate education that prepares students for diverse careers within and beyond the academy.

We will be welcoming and foster belonging and success for all. We are a diverse community, defined by the rich palette of cultures we share, and we will strive to eliminate achievement gaps among sub-groups of students and inequities in the advancement of faculty and staff. We will foster the personal success of each member of the university community and instill a commitment to serve Oregon, the nation, and the world.

We will be visionary in our integration of the arts, humanities, sciences and engineering. The arts and humanities are core to the University’s mission in their own right, and an education that integrates the arts, humanities, and STEM fields enables students to think critically, engage meaningfully, and successfully address contemporary challenges.

We will be accountable leaders. We are accountable and act with integrity in all that we do. We lead and act in service of others.
We will be agile and entrepreneurial. We will engage in public-private partnerships when they serve to advance the economy, sustain our natural environments, use resources wisely, and strengthen communities. We are responsive to our students, society, and donors. We have a prominent community-based presence across Oregon, and offer programs that are agile in serving emerging learner, economic, and community needs.

We will be mindful of this special place and all Oregonians. We are Oregon’s statewide university with a presence in Corvallis, in Bend at OSU-Cascades, on the coast at Newport, and in Portland, and with educational programs, extension activities, and engagement in all 36 counties. We will always serve this special place, along with its people and natural resources.
OUR STRENGTHS IN 2030

This fourth iteration of the university’s strategic plan lays out goals and actions over the period 2019 through 2023 that will drive us closer to a set of distinctive strengths achievable by the year 2030, provided we are bold and effective in our execution and investments. The strengths we envision in 2030 fall into four areas.

INNOVATION IN EDUCATION, INCLUSION AND COLLABORATION

Our success in research, innovation, education and engagement depends on how well we value and engage the rich diversity of our entire community of internal and external stakeholders. We stake our reputation on truly transforming lives by providing access to high quality, affordable education that rests on our research and engagement missions and is inclusive of diverse people and ideas. We educate our students to think critically about a changing world and to address complex contemporary challenges. We attract students throughout Oregon and from around the world by offering globally relevant and affordable academic degrees. We are a university without walls where ideas and collaboration flow freely, and students are partners in research and scholarly endeavors. Industry-funded and alumni-based partnerships support experiential learning and internships across all disciplines for all students.

• Our retention and graduation rates are in the top 10 percent among land-grant universities.
• Innovative degree pathways maximize access and the readiness and success of both first-year and transfer students.
• We provide affordable higher education for the underserved, and enable students to complete a high-valued bachelor’s degree within four years.
• There are no graduation achievement gaps among sub-groups of learners.
• We are leaders in the development and deployment of technology-enhanced lifelong learning.
• Our student body and faculty are diverse, and we have partnerships with select universities around the world that enable us to contribute significantly to global scholarship, education, and engagement.
• We are a destination of choice for women and historically underrepresented groups in STEM.
• We provide for all student-athletes’ success in academics and competition by providing equitable access to academics, student support programs, and quality facilities.
REVOLUTIONARY EARTH SYSTEMS SCIENCE

We are a global leader in research, teaching and engagement involving the world's marine and coastal environments, agricultural and forest resources, and the planet. We address issues ranging from climate change and ocean acidification to the loss of biodiversity, wildfire, resilience to natural disasters, and water resources. Our efforts sustain healthy, productive marine, freshwater, and terrestrial ecosystems. We provide leadership for large, multidisciplinary research teams to understand ecosystems and to develop the science and solutions to steward them for future generations. We produce science-based solutions to guide sustainable use of renewable resources.

• We are a global leader in blending the natural and social sciences, unique experiential learning opportunities, interdisciplinary research, and engagement to address the health and well-being of the ocean and coastal communities.
• Our earth system science researchers and students operate pole-to-pole connecting science to society and improving environmental literacy.
• OSU’s Hatfield Marine Science Center is a global destination for research and discovery and a hub for collaborative teaching and experiential learning.
• OSU-Cascades utilizes its extensive natural laboratory to address the resiliency of ecosystems and connections to health, wellness, and economic prosperity.
• We are a world leader in research on energy.
• We are a leading innovator in water resources research and global water conflict resolution.
• We serve the world and enhance rural economies through continued discovery in the use of mass timber for multi-story buildings.
LEADING IN HEALTH AND WELLNESS

Our teaching, research and outreach are at the forefront of addressing rapidly changing global health and nutrition needs. Working in urban and rural settings, we address the interdependence of the health of humans, animals and the environment with systems-based solutions. Our integrated approach to health science links human and community health and well-being to the health and resiliency of the earth's natural systems. We address health care problems and outcomes locally and globally. Our collaborative culture, the richness of our multidisciplinary and college-based programs, and our statewide reach through OSU Extension collectively address the broad challenges affecting vulnerable populations.

• Our academic programs in oceanography, forestry, engineering, agricultural sciences, veterinary medicine, liberal arts, and public health and human sciences integrate the sciences, policy, and the humanities, and contribute to improving health and social well-being worldwide.
• With partners, including Oregon Health Sciences University, we are a leader in the biomedical sciences and health care delivery.
• We provide high quality health and diagnostic services for animals throughout the state of Oregon and beyond and are leaders in research on animal and human disease and food safety.
• Our statewide network of public health and extension partnerships is a national model of health services delivery to serve individual and community needs.
• We are global leaders in discovering new crops and protein sources, developing food safety practices, and creating and marketing high quality and healthy food products.
• We advance Oregon’s reputation for innovation and address the food and nutritional needs of a growing global population.
• Oregon’s diverse agricultural and food systems integrate our technologies into food production to combat nutrition-related health inequalities and chronic diseases.
ADVANCING ECONOMIC PROSPERITY AND SOCIAL PROGRESS

Our discoveries are the engine for improving the welfare of our society, economy and planet. Innovation inspires the creation of new enterprises and investments by businesses and philanthropists while serving as a launch pad for commercialization and technology transfer. We foster sustainability, create new technologies, build new companies and train the next generation of innovators.

• Our career-focused internships and entrepreneurship programs prepare students to serve as tomorrow’s business innovators and community leaders.

• Our arts and education complex is a technology-infused center of creativity, performance, and expression.

• We are a world leader in robotics and its ethical, economic, and social implications.

• We are a global center of excellence in integrating big data science and informatics in our natural resource, engineering, and health research.

• We are a preferred global partner in developing marketable sources of energy that propel economic prosperity and enable carbon neutrality.

• Our fermentation program is recognized internationally, and builds thriving business partnerships.

• We have a strategic presence in Oregon’s urban and rural areas and offer programs that serve the needs of learners, businesses, and communities.
FOUR GOALS

Goal 1
PREEMINENCE IN RESEARCH, SCHOLARSHIP AND INNOVATION

We will establish OSU as a leader in conducting research, producing knowledge, and generating innovations that contribute to addressing global grand challenges, particularly in our signature areas; training the next generation of scholars; and contributing to the economic development and prosperity of Oregon and beyond.

So that we are distinctive for our...
• Highly collaborative and globally focused research and innovation enterprise
• Faculty actively engaged in public scholarship and outreach
• Graduate and professional education that leads to diverse, rewarding careers
• Relevant and enduring partnerships with government, industry, and other universities at home and abroad
• Policies and systems supporting innovation and entrepreneurship
Goal 2
TRANSFORMATIVE EDUCATION THAT IS ACCESSIBLE TO ALL LEARNERS

Oregon State will use its many locations and online learning platform to maximum advantage in delivering distinctive and affordable education via multiple pathways, integrating research and experiential learning, preparing students for successful careers, training scholars, and creating opportunities for lifelong learning at OSU.

So that we are distinctive for our...
• Graduates’ professional success and upward economic mobility
• Graduates’ preparation to work effectively in a diverse society and as global citizens
• Equity in access and achievement among learners from diverse backgrounds
• Delivery of innovative curricula by faculty who are recognized for excellence in teaching and research
• Deep integration of research and discovery in the learning experience of all majors
• Emphasis on experiential learning opportunities for undergraduates
Goal 3
SIGNIFICANT AND VISIBLE IMPACT IN OREGON AND BEYOND

Oregon State will actively engage with the communities we serve, ranging from rural and urban Oregon to every part of the globe, and bringing their knowledge, experiences and cultures into the university; promoting the vitality of our communities and the quality of life for Oregonians; and being of service to government and industry.

So that we are distinctive for our...
- Reputation as Oregon’s statewide university
- Programs that serve as learning laboratories for communities to engage with OSU’s faculty and students
- Economic development impacts that originate from OSU research and innovation
- Inclusive partnerships that connect our scholars and students through global networks and exchanges
- Highly-engaged alumni and friends that serve as ambassadors for our educational programs and research endeavors
Goal 4
A CULTURE OF BELONGING, COLLABORATION AND INNOVATION

Oregon State will build an organizational culture founded on the values of inclusion, mutual respect, good physical and mental health, collaboration, and humility, so that people from every background are welcomed and thrive, our community is diverse, and our leadership advances both excellence and innovation.

So that we are distinctive for our...
- Demonstrated commitment to diversity, equity, inclusion, and justice
- Support for the long-term success of our tenure-track and non-tenure track faculty
- Support of the career progression and long-term success of our staff
- Commitment to highly functioning shared governance
- Deliberate approach to developing effective administrators and leaders
- Nimbleness in the face of rapidly changing forces in higher education
STRATEGIC ACTIONS: 2019-2023

Continue attracting and supporting a diverse, world class faculty
Create a Commission on the 21st Century Professoriate • Provost’s Hiring Initiative, with emphasis on areas of distinction • Increased endowment support for hiring and retention • Recruitment partnerships with institutions training underrepresented scholars • Stronger culture of welcoming and supporting international faculty • Better tracking of recruitment and retention outcomes

Provide distinctive curricula and support innovative pedagogy to advance our mission and vision
Reform the Baccalaureate Core • Retool and invest in teaching and learning support programs • Establish a teaching academy • Advance OSU-Cascades’ goal to offer a more intimate learning experience within a major research university • Develop a teaching professor career track • Assess benefits and costs of a shift to a semester system • Strategic portfolio approach to academic program development

Diversify our research portfolio and strategically build our graduate programs
Develop and launch an integrated research and graduate education strategy • Increase strategic partnerships with external research institutes and industry • Build endowment support for graduate student fellowships • Build endowment support to catalyze “moonshot” research projects

Retool the OSU experience for the 21st century learner
Refine information and digital tools to make navigating the OSU learning experience simpler and more seamless • Increase transparency around costs and career opportunities • Ensure communications, policies, and programs are not biased to traditional learners • Establish peer communities for transfer students
**SELECTED TACTICS**

**Implement an integrated approach to recruiting and enrolling learners at all levels**

- Conduct an external review of our enrollment management system to assess practices and needs for investment
- Rationalize central and college roles around marketing and recruitment
- Complete community college transfer advising pilot
- Develop a strategic plan for Open Campus

**Substantially improve our physical and administrative research infrastructure**

- Using a combination of the new Capital Renewal Fund, other university and state resources, and philanthropy, renovate and renew our research laboratories and facilities
- Retool systems and increase our investment in supporting research and innovation

**Increase experiential learning opportunities and ensure access**

- Formalize mechanisms for transcript visible articulation of experiential learning
- Expand the availability of faculty-led service learning options
- Build endowment and scholarship support to expand experiential learning and research opportunities for undergraduates

**Expand pathways to an OSU credential**

- Increase need-based financial aid and scholarships
- Design and implement high quality accelerated learning platforms
- Better facilitate credit transfer and degree progression of transfer students
- Continue strategic development of hybrid offerings
- Continue development of OSU-Cascades
- Increase summer offerings to reduce time to degree
SELECTED TACTICS

Make strategic investments in interdisciplinary and transdisciplinary scholarship, teaching and engagement

Develop and launch a comprehensive interdisciplinary health sciences strategy • Clarify administrative structure and budget model supporting interdisciplinary graduate programs
• Develop and launch a strategy to advance the integration of the arts, humanities, and STEM in research and education

Integrate inclusive excellence principles and practices into all aspects of the university

Implement OSU’s diversity strategic plan
• Evolve and sustain the OSU ADVANCE training program • Recognize and reward integration of diversity, equity, and inclusion principles into research programs and graduate curricula • Ensure that all faculty are skilled in inclusive teaching and advising practices

Increase our retention and graduation of all students

Redesign and implement changes to support systems for students’ transition from admission to the end of the first year of enrollment • Increase completion and persistence grants via philanthropic and university sources • Coordinated delivery system for completion grants • Simplify suite of digital tools supporting teachers and advisors

Further internationalize OSU

Develop and launch an international strategy that blends teaching, research, and engagement
• Diversify international student recruitment
• Expand global curricular and co-curricular offerings
• Establish strategic international partnerships
**Support interdisciplinary education, research and engagement on healthy ocean and coasts through the Marine Studies Initiative**

Create an interdisciplinary Marine Studies degree offering • Complete the Marine Studies Building and housing in Newport • Make targeted hires to support the increased delivery of experiential learning at the Oregon coast • Develop and launch a strategy for engaging private foundation support for marine-related research and engagement

**Reduce our carbon footprint**

Evaluate return on investment and develop a plan for increasing the retro-commissioning of existing buildings • Complete an energy policy to guide systems installed in new facilities and the operations of existing facilities • Increase visibility and support for our carbon reduction goals and plans

**Strengthen our support system for innovation and entrepreneurship**

Review and update policies and practices supporting faculty entrepreneurship and innovation activities • Establish an investment strategy and success model for supporting commercialization of OSU innovations • Revise Promotion and Tenure (P&T) guidelines to support innovation and entrepreneurial activities

**Retool our approach to university-industry and alumni, parent and friend engagement**

Implement an agreed model for aligning engagement efforts among campuses, colleges, the OSU Alumni Association, and the OSU Foundation
Clarify vision, communications and governance guiding our physical and digital footprint

Strengthen alignment within the university among our branding, marketing, communications and public affairs efforts

Implement a comprehensive talent management system

Integrate and simplify technology systems, data practices and policies to increase our organizational agility

SELECTED TACTICS

Develop a long-term vision for OSU’s major locations (Corvallis, Bend, Portland, Newport) • Complete a new framework (master) plan for the Corvallis campus • Expand internal communications to more fully engage employees and students among OSU’s locations • Coordinate marketing and communications across onsite, digital, and hybrid learning platforms

Annually review marketing materials produced by all university units to best serve colleges, units and SP4.0 • Expand central media relations efforts to enhance knowledge of OSU beyond Oregon • Use conference services and digital media to connect faculty to external colleagues and issues of global significance • Track and report results against marketing investments

Develop and implement a comprehensive talent management approach to recruiting, retaining, and developing faculty and staff • Develop and implement stronger onboarding, management, and leadership training programs at all leadership levels

Revise systems, processes, and policies to ensure all employees readily have secure access to the data they need to do their jobs and enable data-informed decisions • Tightly integrate existing and future technology systems to streamline IT experiences for faculty, staff, and students, minimizing time spent in administrative activities
OUR PROGRESS

Since 2004, we have engaged in strategic planning to deliver on our commitments to serve the state, the nation, and the world. Our 2004-2008 plan articulated the university’s vision to become one of the country’s top ten land-grant institutions; identified our three Signature Areas of Distinction; and outlined our core values of accountability, diversity, integrity, respect, and social responsibility. Our subsequent two plans (Strategic Plan – Phase II 2009-2013 and SP3.0: Focus on Excellence) laid out actions to enhance faculty excellence, build our research enterprise, develop our signature areas, broaden and deepen the diversity of our community, better steward our resources, and capture the power of information to transform OSU’s learning environment.

PROGRESS ON 2018 GOALS

Over the past five years, we made significant strides as tracked by our metrics. We exceeded our 2018 target for total degrees awarded, and enrollment grew in all modalities at all levels, both in Corvallis and at OSU-Cascades. We met our research and development expenditures goal in 2016-17; the 2017-2018 period is projected to be another outstanding year for Research and Development (R&D) expenditures and for R&D expenditures per tenured/tenure track faculty member; and the number of PhDs we awarded grew. Our service to non-traditional, mostly adult learners exceeded expectations significantly: enrollment in Ecampus programs by degree seeking students is up 88 percent since 2014 and exceeds our target by 50 percent.

We have work to do to diversify our student population, retain our first-year students, and reduce the time to graduation for all student cohorts. Our first-year retention rates for incoming, first-time degree seeking students did not change over the SP3.0 timeframe, our six-year graduation rates increased but fell short of the target, and our junior transfer four-year graduation rate fell. While we met our SP3.0 target for the share of domestically underrepresented students at OSU, the share of international students has plateaued and fallen short of goal.
2004: Strategic Plan 1.0

2007: The Campaign for OSU, the university’s first-ever capital campaign, launches with a goal to raise $625 million. New research grants and contracts total $185 million.

2009: SP2.0

2013: The National Science Foundation selects Oregon State to lead the design of as many as three new academic research vessels. In 2017, the NSF awards OSU $121.88 million to launch construction of the first vessel, to be based at Oregon State’s Hatfield Marine Science Center.

2014: SP3.0

2014: The Campaign for OSU concludes, raising $1.14 billion that helped construct or renovate 28 buildings; endow 79 faculty positions; provide $189 million for scholarships and fellowships; and increase support for Oregon State’s teaching and research initiatives. Construction projects included new homes for four of OSU’s nine cultural resource centers.
**2017**: OSU150 launches a 15-month, statewide celebration of the university’s 150th anniversary, its unique mission and ongoing impact.

**2016**: President Ray launches the Student Success Initiative, which by 2020 commits the university to raise first-year retention rates and six-year graduation rates for all students. The OSU Foundation commits to raise $150 million to support the initiative. OSU-Cascades opens its new campus in Bend, with capacity to serve 3,000 to 5,000 students in Central Oregon.

**2018**: In fiscal years 2016-18, Oregon State faculty attract $1.13 billion in external research funding — marking the three highest years in the university’s history. OSU programs in forestry, oceanography, agricultural sciences, robotics and online degrees earn top-tier rankings.

**2019**: Oregon State launches Strategic Plan 4.0 to guide the university over the next five years. Enrollment stands at a record 32,011, making OSU the largest university in the state for the fifth year in a row.

**2019**: SP4.0
NOTES

**Degrees Awarded.** Undergraduate and graduate degrees awarded in a given academic year. Targets pending confirmation.

**Ecampus Degree-seeking Enrollment.** Students who have designated Ecampus as their primary degree-seeking campus. Target envisions 5 percent growth per annum.

**Doctorates Awarded.** Target aspires to 2 percent growth per year and takes into account enrollment patterns through fall 2016. The projection may be optimistic given the softening nationwide in international graduate student enrollments since 2016.

**Retention Rate.** First year retention and six-year graduation rates are determined using designated “freshmen” cohorts. The cohorts are based on first-time/full-time college students who are seeking a degree. The target is based on Board of Trustees-endorsed 2020 stretch goals.

**Graduation Rates.** The six-year graduation rate is the percentage of an entering fall term cohort that received a bachelor’s degree within six years of matriculating at OSU, with the target based on Board of Trustees-endorsed stretch goals for 2020. The junior transfer four-year graduation rate is the percentage of a junior transfer cohort—entering in the fall term—that received a bachelor’s degree within four years of matriculating at OSU. The junior transfer graduation rate target reflects our efforts to enhance completion rates for all transfer students.

**High Achieving High School Graduates.** The percent of new, fall, first-time Oregon resident students from an Oregon high school who report a grade point average of 3.75 or above. The 2017-18 performance for this metric reflects a change in how the metric is calculated. Prior to 2017-18, the metric was based on a weighted (for honors and AP courses) GPA. The target is a stretch goal.

**Domestically Underrepresented Students.** The percent of total fall term graduate and undergraduate enrollment comprised of U.S. students who are Asian, Black or African American, American Indian/Alaska Native, Hispanic, Native Hawaiian/Pacific Islander, or reporting two or more races. This does not include international students or students enrolled at OSU-Cascades. Note: this metric was formerly reported as U.S. Minority Students.

**Historically Underrepresented Students, Faculty, and Staff.** Includes students, faculty, and staff who are Black or African American, American Indian/Alaska Native, Hispanic, or Native Hawaiian/Pacific Islander. These metrics are based on headcounts. Academic faculty include tenured/tenure-track, research, and fixed-term instructors. This does not include international students, faculty, or staff.
**International Students.** The percent of total fall term enrollment that is international, i.e., students on a visa and not a permanent resident of the US. The target is based on OSU Corvallis international student enrollments, tempered by the overall decline in international students coming to the US.

**R&D Expenditures and Industry Dollars as a Percent of R&D Expenditures.** These metrics reflect total research and development expenditures for a specific fiscal year. The targets envision 10 percent growth per year.

**Invention Disclosures and Licensing Revenues.** An invention disclosure is a confidential document prepared and submitted by OSU employees, students, or affiliates who utilized OSU resources in the development of an invention. The Office of Technology Transfer assesses the intellectual property and commercial potential of the invention. Target invention disclosures is based on 10 percent growth per year relative to 2017-18 performance. Target licensing revenue reflects aspirational growth in invention disclosures and increased efforts regarding entrepreneurship and innovation.

**Dollars Leveraged per Appropriations for Statewide Public Services Research.** The target is pending confirmation.

**Annual Private Giving.** Total outright gifts for operating and capital expenses given in the concluding fiscal year. Includes deferred gifts valued at current face value. The target is pending additional information.
We believe in our community.

**Our Mission:**
As a land grant institution committed to teaching, research, and outreach and engagement, Oregon State University promotes economic, social, cultural and environmental progress for the people of Oregon, the nation and the world. This mission is achieved by producing graduates competitive in the global economy, supporting a continuous search for new knowledge and solutions and maintaining a rigorous focus on academic excellence, particularly in the three signature areas:

- Advancing the Science of Sustainable Earth Ecosystems
- Improving Human Health and Wellness
- Promoting Economic Growth and Social Progress

**Our Vision:**
To best serve the people of Oregon, Oregon State University will be among the Top 10 land grant institutions in America.
We believe in Oregon State University.

As a community, we are each committed to uplift the dignity of those with whom we interact in the course of our campus life. We strive to create a nurturing campus community with mindfulness of the awesome responsibility that goes with preparing students to live successfully in a complex world. As leaders and educators, we are charged to listen more openly, respond more sensitively and support more unconditionally on our journey toward a just, inclusive and equitable campus community. Success at building community, like success in any other endeavor, requires disciplined behavior, deep commitment and persistence. Therefore, we assertively declare that true community is our aspiration, and we will hold ourselves accountable for doing what is required — nurture healthy relationships, enhance the condition of our collective space, build networks of care, embrace shared governance and acknowledge and celebrate our humanity.

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EXECUTIVE SUMMARY

As a leading institution of higher education, Oregon State University must be on the forefront of new ideas, research and innovation. We must continually strive to push ourselves in new ways that challenge our thinking and past practices.

The university’s updated strategic plan, known by the campus community as SP 3.0, provides a roadmap and vision for our future. Our mission and goals remain committed to a rigorous focus on academic excellence in all aspects of learning, discovery and engagement.

Founded in 1868, Oregon State is the state’s land grant university and is one of only two universities in the U.S. to have land, sea, space and sun grant designations. Oregon State is also the only university in the state to hold both the Carnegie Foundation’s top designation for research institutions and its prestigious Community Engagement classification. This evolution of Oregon State’s strategic plan builds upon previous plans set forth in 2004 and 2009. Our focus is unwavering on the signature areas of creating and enhancing a healthy planet, healthy people and a healthy economy.
SP 3.0 expands Oregon State’s strategic goals to focus on:

- Success that transforms our learners and our world.
- Leadership that integrates scholarship, creativity and collaboration throughout learning and discovery.
- Expansion of the university’s diversity, reach and service across Oregon, throughout the nation and around the world.

As we approach the university’s sesquicentennial in 2018, we remain committed to the ideals that higher education is a public good, and that high-quality college degrees should be accessible to all students. By pursuing new innovations and scaling those that are successful, we will significantly increase the number of students from all strata and diverse backgrounds graduating with quality college degrees. Our strategic plan provides the structure and momentum to give all learners an integrated, coherent and personally meaningful educational experience.

This blueprint for future success also calls for the university to enhance faculty excellence, broaden and deepen the diversity of our community, reaffirm our excellent stewardship of resources and capture the power of information in transforming our learning environment and systems.

Our strategic planning and the creativity of this remarkable university community have enabled us to advance our mission in a powerful way. This is a journey that will lead to continued success, committed as we have been for nearly 150 years, to the state of Oregon and its people.
GOAL 1.
PROVIDE A TRANSFORMATIVE EDUCATIONAL EXPERIENCE FOR ALL LEARNERS

Oregon State University will promote student success through learning experiences and outcomes that seamlessly integrate teaching and research efforts. This integration will provide a platform to deliver content and experiential opportunities that support intellectual, professional and personal development to prepare Oregon State graduates for responsible and productive citizenship in a global society.

Oregon State will become a model 21st century university by developing personalized and integrated ways to learn. Innovative, integrated programs will offer high-quality educational experiences for undergraduate and graduate students, as well as other learners who will become tomorrow's leaders, critical thinkers and problem solvers.

Transforms students
Through excellent and diverse undergraduate and graduate educational opportunities, Oregon State University transforms students into leaders in life, community and career. OSU is Oregon's largest university, having increased enrollment by 34 percent, including OSU-Cascades, over the last five years. In 2013, Oregon State enrolled more than 24,600 students in Corvallis, more than 900 at OSU-Cascades in Bend and more than 3,800 online students in Ecampus.
By moving beyond a one-size-fits-all learning model to offering varied opportunities for different learners, we will better accommodate and serve all students and enhance learning outcomes. We will continue to invest in and recognize the pivotal role faculty and staff play in motivation and learner success.

Strategies

- Enhance an integrated learning environment that raises and equalizes retention and success of all learners.
- Make high-impact learning a hallmark of Oregon State undergraduate education, preparing students for responsible citizenship and global competitiveness.
- Advance teaching and learning in the Baccalaureate Core through innovations in course design, authentic assessment, interactive teaching and faculty development.
- Strategically grow online education programs, explore new pedagogical models and address all learning styles through myriad learning platforms.
- Enhance our comprehensive Healthy Campus Initiative, caring about the health and well-being of students, faculty and staff.
- Expand strategies to recruit diverse and high-achieving students and meet enrollment goals for OSU-Cascades.

An inclusive community

Oregon State achieves excellence through diversity. 21 percent of the university’s enrollment is made up of U.S. minorities — an increase of 50 percent from 2004. International enrollment has tripled since 2009 to nearly 3,000 students in 2013, 10 percent of the student population.

Success for all

An accessible, affordable education is made available through a number of financial aid programs, including the university’s Bridge to Success, in which more than 2,600 Oregon students each year pay no tuition or fees. Meanwhile, personalized academic advising and programs such as the First-Year Experience help students become thriving members of the campus community, achieve academic success and progress to graduation.
GOAL 2.

DEMONSTRATE LEADERSHIP IN RESEARCH, SCHOLARSHIP AND CREATIVITY WHILE ENHANCING PREEMINENCE IN THE THREE SIGNATURE AREAS OF DISTINCTION

Oregon State University will advance the frontiers of knowledge and creativity while innovating and integrating discoveries to address the grand challenges and fundamental needs for sustainable growth and prosperity. The three signature areas build upon Oregon State’s core academic strengths, the excellence and skill of our faculty and our established national and international partnerships.

Oregon State will be a leader in solving society’s most pressing challenges through innovative, integrated, data-enabled research, outreach and creative activity. The university will further its national and international distinction

World-class faculty

Oregon State faculty members are best in class. They achieve academic and research excellence through innovation and collaboration that reaches across all disciplines. The Campaign for OSU has provided more than $100 million to recruit and retain world-class faculty.
through targeted elevation of graduate programs, research and scholarship in the three signature areas. Preeminence in the signature areas is the result of building and maintaining excellence and critical mass in key foundational disciplines reflecting the breadth of the sciences, social sciences, engineering, arts and the humanities.

**Strategies**

- Attract and retain faculty to strengthen the foundational disciplines and excellence in signature areas.
- Expand and cultivate interdisciplinary research through partnerships within Oregon State, along with industry and national and international partners.
- Selectively increase the quality, capacity and impact of Oregon State’s graduate programs, while improving retention and student success.
- Expand and increase visibility of high-profile programs in the performing arts and creative work in the humanities.

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**Accomplished graduate students**

Enrollment in Oregon State’s more than 80 graduate programs has grown by more than 33 percent since 2009. In 2013, the university’s world-class research laboratories and teaching excellence attracted more than 4,500 graduate students from across the U.S. and 100 countries. New Ph.D. programs recently have been added in Comparative Health Sciences, Public Policy and Robotics.

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**Internationally recognized research**

Research at Oregon State continues to grow in reputation and economic impact. Faculty researchers are renowned leaders in marine studies, public health, natural resources, computer science and many more areas. Over the past decade, the university’s research enterprise has more than doubled, reaching $263 million in 2013. Industry-funded research has increased by 65 percent since 2009.
GOAL 3.
STRENGTHEN IMPACT AND REACH THROUGHOUT OREGON AND BEYOND

Oregon State University will enhance our statewide, nationwide and worldwide footprint, pushing boundaries to extend our research and knowledge to people and communities throughout the world. As the land grant institution for the state of Oregon, our successes remain inseparable from those of our constituents. Our statewide footprint continues to grow — through the expansion of OSU-Cascades to a four-year branch campus, our marine studies research and academic programs on the Oregon coast and through our deepening and sustaining investments in the greater Portland metro area and in communities throughout the state. In this era of collaborative partnerships, we connect globally to lead research and conversations on issues of concern for people around the world. In all that we do, we seek to engage our people and others to develop strategies and solutions that advance economic growth and social progress.

America’s natural resources university
Through excellence, innovation and university-wide collaboration, Oregon State has developed a worldwide reputation for leadership in natural resources teaching and research. The university is leading designs for the nation’s next generation of ongoing research vessels, advancing healthy food production, developing novel green materials and creating a world-class marine studies campus along the Oregon coast.
With increasingly interconnected global ties among people, communities and nations, Oregon State also aspires to recruit top-quality international students and faculty, to envision different means of promoting education abroad, to facilitate and value international scholarship and collaboration by our faculty and students, to promote the global dimension of Oregon State’s land grant mission and to strategically engage with our international alumni.

**Strategies**

- Position Oregon State’s outreach and engagement programs as learning laboratories to promote high-impact experiences for students and to promote the broader impacts of university research more effectively.
- Grow rural and urban regional centers to advance social progress for all Oregon communities.
- Drive economic development in Oregon by expanding commercialization, technology transfer and startup companies that originate from Oregon State research.
- Increase the number of Oregon State students who participate in study abroad and grow the number of strategic international research partnerships.
- Engage alumni and other external partners to advance university goals and priorities.

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**Economic prosperity in Oregon**

The university’s contributions in education, research and community engagement extend throughout Oregon’s 36 counties, with an economic impact statewide measured at $9.92 billion in 2011. Along with nearly 19,000 volunteers, OSU Extension faculty serve more than 2.5 million Oregonians annually in urban and rural communities.

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**And around the globe**

Oregon State’s influence also extends throughout the nation and the world, with a 2011 global economic impact of more than $2.06 billion. More than 170,000 Oregon State alumni excel in the world’s workplaces and in community leadership and volunteerism. From studying the damaging effects of natural disasters such as earthquakes and tsunamis to exploring multiple sources for renewable energy and determining ways to enhance wellness as people age, university discoveries advance the health of our planet, its people and our economy.
SIGNATURE AREAS OF DISTINCTION

SP 3.0 reaffirms our commitment to the three signature areas that draw from disciplines across the university and integrate research, engagement and teaching at both graduate and undergraduate levels. The role of land grant universities in the 21st century will evolve from a primary focus of providing information to individual stakeholders for private consumption to include a broader focus of informing society as a whole. This broader focus will inform decisions and policies that will lead to responsible stewardship of environmental and social systems, locally and globally. The university’s long-standing connections with communities and institutions beyond campus borders, with the Statewide Public Services — OSU Extension Service, Agricultural Experiment Station and the Forest Research Laboratory — and with our national and international partners enhance our ability to communicate our discovery and research.
Advancing the Science of Sustainable Earth Ecosystems

Our economic and social well-being is increasingly dependent on the health of the Earth to provide food, shelter, and energy. The challenges we face are at the intersection of our cultures, our economy and our values, and they are characterized by complex linkages between global and local problems, their distributed and changing nature, and a high level of uncertainty (e.g., climate change, biodiversity).

Building on our strong and comprehensive foundation in earth and environmental sciences, Oregon State will create new and powerful bridges with public health, applied economics, public policy, and the humanities. This new framework will rely on discovery-based learning and engagement and will set the stage for broader partnerships with other academic institutions and relevant organizations, both nationally and globally. Our research will further enhance a rigorous approach to prediction and scenario development of human environmental systems by building from a sound theoretical and observational basis.
Improving Human Health and Wellness

As the population grows, ages and diversifies, pressures on health care and well-being locally and globally continue to mount. This is especially true for chronic diseases, which impact the quality of life of 90 million Americans and are responsible for 70 percent of all deaths. Many chronic diseases result from complex interactions between infectious agents, people, animals and the environment. Identifying these relationships can improve health outcomes across populations and create opportunities to reduce the impact of chronic disease.

With strong programs in public health, science, pharmacy and veterinary medicine, along with related health research in the life and environmental sciences, Oregon State scholars address the health impacts of micronutrients, pollutant exposure and exercise, as well as the molecular mechanisms of diseases such as amyotrophic lateral sclerosis (ALS or Lou Gehrig’s disease), cancer and cardiovascular diseases. Partnerships with social science and public policy programs address challenging and emerging public health and environmental health issues with significant local and global impact, and programs in the humanities shape individual and collective responses to human disease, disability and social and medical interventions.

Essential to the Plan

Enhancing diversity, stewarding our resources and recognizing technology as a strategic asset are all essential to the success of this strategic plan. These initiatives are integral to each of the plan’s three goals and their respective strategies.
Enhancing Diversity

Enhancing the diversity of the Oregon State community is essential to attaining excellence in our educational, research and outreach endeavors and to preparing our students to succeed in a globally connected world.

We will:

› Increase the diversity of faculty, staff and students through new hires and enhanced retention efforts.
› Develop more comprehensive work-life balance initiatives for all employees.
› Pursue inclusive excellence — equity in student success and quality learning.
Promoting Economic Growth and Social Progress

Great ideas change the world. The daunting challenges we face — from inequalities in health care, education and security of incomes to increasing pressures on our natural resources — call for innovative and relevant discoveries to deliver essential services and result in greater prosperity for all citizens. Sound, science-based technologies are at the core of these innovations; integration of entrepreneurship, industry partnerships and commercialization bring these innovations from discovery to delivery.

Oregon State University has established a legacy of innovation, cutting-edge research and engagement with our industry and government partners to promote economic growth and overall social prosperity for all. The university achieves these impacts by nurturing a collaborative culture of discovery and innovation statewide while embracing the requirements for sustaining economic prosperity and educating the leaders and innovators of tomorrow’s world. Leveraging strengths in engineering and business, Oregon State draws upon the diversity of disciplines and skills from all corners of campus and the state to create a strong platform for innovation, prosperity and relevance.

Stewardship of Resources

We must ensure that all budget and finance, physical infrastructure and private philanthropy resources entrusted to the university are used effectively, efficiently, transparently and in a socially responsible manner. We will leverage The Campaign for OSU successes to advance the university’s excellence in signature areas and in service to our students.

We will:
- Continue the momentum created by The Campaign for OSU to enhance resources raised through private philanthropy.
- Develop an integrated infrastructure recapitalization plan that includes deferred maintenance needs.
- Promote sustainable stewardship of Oregon State’s campuses, including built and natural environments.
- Work with city and regional partners to appropriately balance economic and environmental improvements.
Technology as a Strategic Asset

Technology and information occupy a critical role in a 21st century university and are an essential part of developing greater efficiencies in institutional and administrative functions. Greater accountability, enhanced expectations of a current generation and growth in the development, management and delivery of digital resources point to the expanding role that data and information technologies provide as a strategic and enabling asset.

We will:

- Ensure that relevant information is widely shared and strategically used to make effective decisions and measure progress toward achieving university goals.
- Invest in information technology to enable educational innovation while enhancing a collaborative and engaged learning environment.
- Implement highly efficient administrative processes to enhance the quality of service and improve productivity.
DECADE OF TRANSFORMATION

Guided by Phase II of the Strategic Plan (2009–2013), Oregon State University has grown in all areas, from numbers and diversity of students and faculty — including high-achieving students — to fundraising, research and discovery dollars, partnerships and physical infrastructure. Incredible progress has been achieved with Phase II’s goal to substantially increase revenues from private fundraising, corporate partnerships, research grants and technology transfer. The Campaign for OSU exceeded its $1 billion goal nearly a year ahead of schedule, fueling Oregon State’s rise as a comprehensive land grant university for the 21st century. Research grants and expenditures have continued to increase dramatically during the last decade, clearly establishing our reputation as the premier research university for the state of Oregon. The university’s faculty has climbed the excellence ladder, outpacing peer institutions for prestigious grants and partnerships and deepening commitments to engaged learning and public service.

Our commitment to Phase II’s goal to provide outstanding academic programs that further strengthen preeminence in the three signature areas of distinction is demonstrated through investments in foundational disciplines, collaborative research initiatives and cluster hires of more than 180 world-class faculty in the past two years, along with the retention of excellent faculty and staff. Oregon State is well-positioned to strengthen its leadership in these signature areas, attract outstanding new faculty, increase the number of high-achieving Oregonians that select Oregon State as their first-choice university and offer an integrated and transformative research and teaching environment.

A community of giving

More than 102,000 donors have helped to transform the university by contributing more than $1.02 billion to The Campaign for OSU. This philanthropic effort will conclude at the end of 2014 and has helped to build, renovate or acquire more than two dozen facilities, raised more than $70 million in merit and need-based scholarships and established more than 75 endowed faculty positions.

*through 6-30-14
Our graduates are the most significant contribution we make to the future. Going forward, the university will be sharply focused on increased student success through graduation for all groups of students.

Oregon State’s future will be guided by the state’s 40–40–20 educational achievement goals — an ambitious plan that calls for 40 percent of adult Oregonians to hold a bachelor’s or advanced degree, 40 percent to have an associate’s degree or a meaningful postsecondary certificate, and all adult Oregonians to hold a high school diploma or equivalent by the year 2025. Additionally, our future will be guided by our decision to pursue a new governance model with an independent board of trustees and the changing landscape at the federal and state levels that will impact funding in many areas.

Oregon State’s accomplishments will be promoted through a comprehensive branding and communication strategy that informs and inspires the public’s engagement in our mission; helps promote industry, public, education and nonprofit partnerships with the university; assists in the recruitment and retention of high-achieving and diverse students, faculty and staff; and portrays Oregon State as a leading 21st-century university.

Oregon State’s commitment to move to the front ranks of international and comprehensive land grant universities in the United States remains a top priority. We intend to continue the pursuit of excellence in every dimension in which we operate. The more exceptional we are at all that we do, the more powerful and positive an impact we will have on the lives of our students and people throughout the world.
KEY INNOVATIVE INITIATIVES DURING THE LAST DECADE

Academic Divisions: To support growth in the three signature areas and further collaboration across disciplines, Oregon State created four academic divisions, each representing a combination of colleges: Earth Systems Science, Health Sciences, Business and Engineering, and Arts and Sciences. This structure has led to many innovative collaborations and programs and shared resources within a division.

Distance Education Enterprise: Reaching students at a distance is a strategic initiative that fits with Oregon State’s land grant mission and will help our contributions to the state’s 40-40-20 goal. Through our Ecampus program, Oregon State has the delivery system needed for world-class online education. Enrollment has grown more than 200 percent over the last five years.

Public-Private Partnership in Academic Delivery: As part of a longer-term educational, diversity and enrollment growth strategy, Oregon State established a partnership with INTO University Partnerships, Inc., a British corporation, to recruit international students to an innovative first-year program. This partnership has resulted in nearly a 200 percent increase in international students from fall 2009 to fall 2013.

Program Rerouting: Oregon State realigned and remapped our academic curriculum to direct more resources to the core academic enterprise. This new alignment created the necessary resources to expand graduate programs.

Transforming Business Centers: Oregon State moved financial transactions and human resource work to seven consolidated business centers, each serving a group of university units. Previously most of these transactions were managed at the department level in each college. The result: one of the first shared-services models in higher education in the nation.
PEER UNIVERSITY COMPARISONS
### BENCHMARKS FOR EXCELLENCE

#### Metrics Associated with Institutional Mission and Goals

<table>
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<tr>
<th></th>
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<tr>
<td>Degrees Awarded — Total</td>
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<td>4,232</td>
<td>5,055</td>
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<td>Degrees Awarded — OSU-Cascades</td>
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<td>-</td>
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<td>360</td>
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<td>First-Year Retention Rate</td>
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<td>Six-Year Graduation Rate</td>
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<td>International Students</td>
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<td>$232.6</td>
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<td>Ph.D.s Awarded</td>
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<td>Invention Disclosures</td>
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<td>Licensing Revenues (in millions)</td>
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<td>Ecampus Degree-Seeking Enrollment (student primary campus)</td>
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<td>Dollars Leveraged per Appropriated Dollar for Statewide Public Services Research</td>
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AT OREGON STATE, WE ARE:

» Grounded in an academic community characterized by respect for each person; innovation and creativity; integrated and transformative learning environments; equitable and inclusive practices; passion for our world and a commitment to improve its condition; and a collaborative environment where partnerships are nurtured and cherished.

» Focused on discovery and relevance.

» Committed to being a great place to work, learn and flourish; and to creating and sustaining healthy environments that enable community members to live productive, balanced and engaged lives.

» Dedicated leaders who reflect our civic and global responsibility to be stewards of our mission and our many resources.
Oregon State University
Strategic Plan – Phase II
2009 – 2013
Mission Statement

As a land grant institution committed to teaching, research, and outreach and engagement, Oregon State University promotes economic, social, cultural and environmental progress for the people of Oregon, the nation and the world. This mission is achieved by producing graduates competitive in the global economy, supporting a continuous search for new knowledge and solutions, and maintaining a rigorous focus on academic excellence, particularly in the three Signature Areas: Advancing the Science of Sustainable Earth Ecosystems; Improving Human Health and Wellness; and Promoting Economic Growth and Social Progress.
Vision

To best serve the people of Oregon, Oregon State University will be among the Top 10 land grant institutions in America.

Goal 1
Provide outstanding academic programs that further strengthen performance and pre-eminence in the three Signature Areas of Distinction: Advancing the Science of Sustainable Earth Ecosystems; Improving Human Health and Wellness; and Promoting Economic Growth and Social Progress.

Goal 2
Provide an excellent teaching and learning environment and achieve student access, persistence and success through graduation and beyond that matches the best land grant universities in the country.

Goal 3
Substantially increase revenues from private fundraising, partnerships, research grants, and technology transfers while strengthening our ability to more effectively invest and allocate resources to achieve success.
Executive Summary

Phase II of Oregon State University’s 2004 Strategic Plan for the 21st Century continues the University’s ambitious drive to rank among the ten best Land Grant universities in the nation. This updated Plan builds on OSU’s long tradition of excellence in education, research, and outreach – and on the significant progress arising from the initial Strategic Plan and the University’s first university-wide capital campaign – to:

- Sustain and accelerate improvements in student learning and experience through creation of outstanding academic and student engagement programs;
- Align and strengthen innovative scholarly and research activities to continue discovering new products and technologies that generate economic activity; and
- Focus even more intently on enhancing OSU’s ability to produce strategies and solutions for the most important – and intractable – issues facing Oregon, the nation, and the world.

Phase II rests on an intensive focus on three Signature Areas of Distinction: Advancing the Science of Sustainable Earth Ecosystems; Improving Human Health and Wellness; and Promoting Economic Growth and Social Progress. All three build upon the University’s core teaching and research strengths, the skill and capacities of its faculty, and OSU’s many established national and international partnerships and collaborations. Collectively, the Signature Areas represent OSU’s greatest opportunity to lead in solving complex societal problems, and to create superior learning opportunities for students by:

- Improving the understanding of the earth ecosystems upon which all life depends, and promoting their sustainability through high-impact public policy involvement with issues such as climate change, food security and safety, renewable energy production, and economically viable natural resource management;
- Building more holistic and interdisciplinary approaches to healthy aging, chronic infectious disease control, new drug development, mental health, and disease prevention to enhance the human lifespan, decrease health care costs, and maintain a healthy population;
- Capitalizing on an expanding institutional culture of innovation and collaboration to discover and implement creative, economically powerful solutions to America’s critical challenges through leadership in areas such as energy and clean technology, micro and nano technology, and natural resource product technology.

The fundamental goals of the Strategic Plan – Phase II remain essentially unchanged from the 2004 Plan. This document highlights progress achieved under the plan during the five-year period 2004–2008, describes the primary contextual trends and challenges to which the university must respond going forward, describes the three new signature areas and outlines the key future initiatives to sustain the progress achieved since 2004.
I. Introduction

Steadfast in its vision to stand with America’s 10 best Land Grant universities, Oregon State University seeks to advance its ambitious 2004 Strategic Plan for the 21st Century by continuously focusing and aligning its educational, research, and outreach and engagement activities towards this goal. The 2004 plan (oregonstate.edu/leadership/strategicplan) harnessed OSU’s long history of educational, social, and technological accomplishment as the Land Grant University for the people of Oregon, guiding the University over a five year period (2004-2008) and setting the stage for greater achievement and prominence.

The first Strategic Plan intensified OSU’s commitment to serve as an engine for economic growth and social progress by preparing graduates to compete and succeed anywhere; by generating knowledge targeted at society’s most pressing challenges; and by solving problems and creating economic activity through innovative new products, technologies, and applications. Going forward, OSU will work across disciplines and collaborate with external partners to enhance its positive impact on the nation and the world, especially in areas where the University has global leadership capacity.
Mission and Fundamental Goals

Oregon State University is committed to a rigorous focus on academic excellence in all aspects of its missions teaching, research, and outreach and engagement. The OSU Strategic Plan rests on a set of three fundamental goals: provide outstanding academic programs, enhance the teaching and learning environment, and increase investment in academic priorities. A Statement of Vision and Core Values supports these goals. Phase II adheres, with minor changes, to the vision and goals presented in the 2004 document.

OSU prepares talented young people from all backgrounds to be leaders and productive members of our society by helping them become critical thinkers, global citizens and skilled professionals. Its alumni are leaders in business, industry, service and education sectors of Oregon and the world. OSU has degree programs that produce graduates who now and in the future will sustain areas critical to Oregon’s economic vitality, including energy, health, nutrition and green development. The University is a significant contributor to the State’s economy and economic development, and its core competencies are an excellent fit with Oregon’s needs and priorities. While the global economy struggles with the consequences of mismanagement of the natural world as well as crises in health and nutrition, OSU carries a legacy of knowledge-driven stewardship of the environment and a track record of developing technology and approaches to help create more effective and equitable systems for addressing health, food and other human systems.

Progress has been measured annually against a set of Strategic Plan metrics. The Office of the Provost issues yearly reports on performance. These may be read at oregonstate.edu/leadership/strategicplan. A metrics-based assessment of progress, including 2013 targets, will be found at the same web page.
Signature Areas of Distinction

The 2004 Strategic Plan established five thematic areas to be the focus of resource allocation, faculty hiring, scholarly emphasis, and research. Sustained attention to these areas has resulted in greater interdisciplinary collaboration, scholarly achievement, and external impact, including the development of new institutes and centers targeted at such critical issues as water resources and climate change. This document outlines how Phase II coalesces these five areas into three Signature Areas of Distinction that are more targeted in their aspirations and more inclusive of the University’s core strengths and unique capabilities. These three Signature Areas of Distinction encompass: Advancing the Science of Sustainable Earth Ecosystems; Improving Human Health and Wellness; and Promoting Economic Growth and Social Progress.

Education and inquiry in the three Signature Areas will build upon a foundation in the arts and sciences to promote economic innovation, an educated citizenry, a globally competitive workforce, and strategies for addressing difficult regional, national, and global issues.

Phase II of the Strategic Plan will guide OSU over the next five years (2009 – 2013) as the University continues to pursue its vision of achieving top ten status among Land Grant universities.
II. Phase II Background

A number of factors inform Phase II of the Plan. These include progress against 2004 goals, changes in environment, and national and global issues. These factors are concisely summarized below.

Progress Against 2004 Goals

OSU made substantial—sometimes remarkable—progress against Strategic Plan benchmarks. Overall, the University benefited from the sense of purpose and alignment fostered by the Strategic Plan and the accompanying success of the Campaign for OSU. Particular progress was seen in these areas:

- Promotion of a culture of collaboration across the campus, both at the faculty level and in the relationships among the University, Alumni Association, Foundation, and outside stakeholders. Interdisciplinary scholarly activity, encouraged by institutional investment in the five thematic areas, was increasingly seamless and powerful, improving student learning and research productivity.
- Attention to increasing excellence and leveraging institutional and philanthropic resources enhanced academic programs and learning environments.
- Expansion of the research enterprise and a sustained emphasis on innovation resulted in a very significant increase in external grants and contracts, patents, technology transfer, and commercialization activities, generating new business opportunities and establishing substantial new research enterprises.
- Controlled growth in student enrollment, with a focus on increased diversity of the student population and on raising the proportion of non-resident students in the student mix, moderated financial pressures and allowed for greater concentration on student life and student experience while increasing the number of students—now at an all-time high—benefiting from an OSU education.
- Substantial progress in assessing student learning outcomes and promoting student mental and physical health generated improvements in curriculum, teaching, and student experience.
- Significant advances derived from OSU’s first comprehensive capital campaign included physical infrastructure improvements in academic and athletic areas and dramatically heightened pride, enthusiasm, and morale among all OSU constituencies.
Targets were not met in all areas. Among the areas of concern:

- **Student retention rate and graduation rate** remain a host of expectations. A more aggressive and integrated approach is required in Phase II to maximize and equalize retention and graduation rates for all student cohorts.
- **Fostering a sense of community and improving the diversity climate on campus** is still a work in progress, even as diverse enrollments are at all-time highs and prospects for enrolling more international students are strong.
- **OSU’s regional positioning** – especially in Portland and Central Oregon – remains insufficient, undermining visibility and impact in key areas. New strategies and targeted attention from the University, the Alumni Association, and the OSU Foundation show promise, if given sustained effort and support.
- **Deferred maintenance** constrains learning and research. Renovations to classrooms and shared research facilities (laboratory animal research and electron microscopy) are underway and will be intensified as funds permit.
- **Institutional marketing and visibility** still falls short of many peers.

  Development of an Integrated Marketing Plan, set for completion in 2009, will guide improvement in this pivotal activity.

### Changes in State Environment

Phase II of the Plan is informed by external factors, especially changes in the larger social and educational environment and the steady emergence of global challenges. The following are the key statewide dynamics shaping OSU’s external environment:

- **Declining educational aspirations**, to the point where Oregon has one of the greatest disparities in the United States between the educational attainment of older and younger residents. Census data reveal that 39% of Oregon adults aged 45–54 hold undergraduate degrees compared to only 35% of adults aged 25–34. This trend is especially pronounced among undererved and economically disadvantaged communities.

  OSU has responded in several ways:

- A pioneering degree partnership program with all 17 Oregon community colleges encourages community college students to complete four-year degrees.
- The comprehensive Bridge to Success student access initiative, inaugurated in Fall 2008, greatly expands financial support and educational opportunities for students facing economic hardship.
- New Academic Support programs, peer-to-peer mentoring in foundational courses, and summer orientation programs are easing student transitions to OSU.
In recent years, competition for state resources has resulted in a shift of financial support away from higher education.

OSU has responded by launching an aggressive effort to develop and secure alternate sources of income, and by instituting greater transparency in budgeting and rigorous cost-containment.

Unpredictable funding streams for the Statewide Public Service Programs (Extension Service, Agricultural Experiment Station and Forest Research Laboratory) that are at the heart of OSU’s Land Grant mission.

OSU Extension has responded by working with county officials to create special tax districts to augment Extension resources – two districts were approved by voters in 2008 – and in establishing fees for some services. Additionally, there is a more intense focus within the Statewide Public Service Programs on positioning faculty for greater success in securing competitive grants and contracts.

Statewide higher education goals recently issued by the Board of Higher Education call on public higher education institutions to create an educated citizenry and provide a globally competitive workforce; ensure access to quality postsecondary education and high quality student learning leading to success; generate original knowledge and advance innovations; and contribute positively to the economic, civic, and cultural life of all Oregon communities.

OSU has responded by fully incorporating these goals in the original Strategic Plan and this update.
National and Global Issues

Phase II of the plan also responds to major national and global trends:

Rapidly intensifying competition for federal research resources challenges OSU and its faculty to continue the university’s track record of external funding success.

OSU has responded by developing a coordinated, carefully-planned effort to increase corporate partnerships; encourage large scale inter-institutional research and development efforts such as ONAMI and the Oregon Climate Change Research Institute; and focus interdisciplinary scholarly activity on the most pressing regional, national, and global issues.

Aggressive competition among universities nationally and internationally affects every aspect of OSU.

OSU has responded by leveraging its status as one of 96 American universities top-ranked as very high research activity by the Carnegie Foundation; by expanding international partnerships (including 200 education abroad programs); by becoming the first American university to partner with INTO University Partners Ltd. to recruit international students; and by developing an integrated marketing program.

Emergence of a global economy and greater cultural diversity in workplaces and communities profoundly influence OSU’s mission.

OSU has responded by striving to produce graduates who can build effective, respectful relationships with people from many backgrounds and experiences; by increasing the support for cultural diversity (including student recruitment and new Cultural Centers); and by expanding internship opportunities for students in business and service sectors. The University also continues to address the cultural dimensions of Oregon communities and leadership through statewide Extension programs.

Growing awareness of the extraordinarily complex, critically important challenges facing the world affects OSU’s teaching, research and outreach priorities.

OSU has responded by explicitly embracing these challenges, creating an environment that promotes interdisciplinary education and research, and further refining its focus in the three Signature Areas of Distinction in Phase II of the Plan.
III. Phase II Imperative And Action Commitments

Informed by its achievements and challenges, and by the changes in its operating environment, OSU is adopting a single overarching imperative and two educational action commitments to guide the University through the next five years.

Phase II Imperative

The University will foster exceptional educational, research, and outreach initiatives that sustain human well-being and improve the quality of human life. Acting on this imperative requires understanding diverse, complex interactions among population, demographics, human health, climate, access to natural resources (including safe food, clean water and air, and wood products), sustainability, economic vitality, cultural diversity, and new technologies, among others. Well-being and quality of life are likewise enhanced by the fine and performing arts and the humanities and social sciences, which promote understanding and improvement in human interactions within and across cultures.

A successful response to this imperative requires OSU to meet two commitments:

Commitment #1

OSU will lead in developing a globally competitive workforce and an informed and capable citizenry. Given complex global challenges and the explosive growth of knowledge and technology, student learning must encompass the basic tenets of human thought, the skills of critical thinking and information assessment, and the capacity to work and live in a multicultural world. Students will acquire the understanding of major political, social and intellectual trends and the functions of the natural world — necessary to address complex academic and research problems.

Commitment #2

OSU will address multifaceted national and global challenges that resist simple technical or social solutions. The University’s education, research, and outreach activities must intensely engage broad intellectual and social communities in seeking solutions to these problems. Therefore, OSU will integrate knowledge and exploration in Signature Areas of Distinction with inquiries in the sciences and humanities that open doors to new strategies and solutions.
IV. Phase II Signature Areas Of Distinction

As indicated above, OSU has refined its opportunities for institutional distinction in Phase II of the Plan. Three Signature Areas of Distinction, informed by the two commitments above, build upon the five thematic areas in the original Strategic Plan in order to provide OSU’s competitive edge, a stronger assertion of institutional identity nationally and internationally, and the greatest possible opportunity to have a positive impact. These three areas are:

Advancing the Science of Sustainable Earth Ecosystems

OSU possesses a distinctive, world-class capacity to improve understanding and sustainability of the ecosystems upon which all life depends, a capacity that will be harnessed to expand OSU’s impact on public policy decisions and the pursuit of social justice for all people.

The relevant issues are increasingly well known and dire. The human population doubled in the last 50 years; it is projected to grow another 30 percent by mid-century. Global economic activity and related consumption of fossil fuels increased five-fold since 1950 and will increase further as nations develop economically. These trends have enormous consequences for oceans, forests, agricultural lands, fresh water, and the atmosphere. Many natural resources are declining in abundance, quality, and/or productivity, hindering the capacity of these ecosystems to sustain a livable planet that can support human well-being and provide an equitable quality of life for all. The interaction between human endeavors and natural systems is projected to become even more congested and troubled in the future at both local and global scales. Key future challenges include linking the drivers of climate and ecosystem change to their impacts on natural and human systems; assessing strategies to mitigate the human “footprint,” (such as carbon sequestration, consumption moderation, and resource conservation); and formulating strategies that balance sustainable environmental, energy, and economic systems.

OSU’s nationally top-ranked programs in oceanic and atmospheric sciences, agriculture, forestry, geosciences, fisheries and wildlife, marine resources, botany, zoology and natural-resource related humanities and arts — augmented by the scientific and policy expertise of major federal research laboratories on campus — give OSU unmatched competitive advantage in the study of earth ecosystems. The synergy produced by the close proximity and interdisciplinary interaction of faculty and students from these programs multiplies the advantage. By working together

Strategic Plan – 2009–2013  Oregon State University
to address challenges in dynamic natural and human systems, OSU faculty and students, in collaboration with their many national and international partners, are poised to make major contributions to knowledge, technologies, and policies related to climate change, food security and safety, renewable energy production, and economic vitality based on sustainable natural resources.

OSU’s extensive capabilities in this area also represent an opportunity to establish distinctive interdisciplinary educational programs that teach students how to solve problems creatively at the overlap of natural and human systems. Similarly, OSU’s long-standing engagement with the larger community through the Extension Service, Agricultural Experiment Station, and Forest Research Laboratory enhances the university’s ability to communicate information and provide answers about pressing environmental concerns broadly and effectively.

**Improving Human Health and Wellness**

With three health-related professional schools and significant national and international research in health and life sciences across the university, OSU is uniquely positioned to enhance the quality of human life across by promoting a more holistic approach to mental and physical health.

As Oregon’s and the nation’s population grows, ages, and diversifies, public health needs are not being met adequately. This is especially true for chronic diseases, which impact the quality of life of 90 million Americans and are responsible for 70% of all deaths. While many chronic diseases result from complex interactions between infectious agents, people, animals, and the environment, traditional health care still focuses principally on the individual patient and the primary disease etiology, without taking into account the environmental, genetic, demographic, and social contexts. Nor are the impacts of chronic
diseases exclusively physical. The World Health Organization estimates that by 2020, depression will be the second leading cause of disability and suffering worldwide, trailing only heart disease.

Needed are comprehensive public health research and teaching programs that address crucial aspects of behavior; interactions among people, animals, and the environment; and the interplay between infectious agents and other factors such as stress, aging and nutrition. To treat and prevent chronic diseases and to promote health, tomorrow’s competitive health professions workforce must match competency in human and animal biological science with an understanding of social, behavioral, mathematical, computational, and public health factors.

OSU’s Colleges of Health and Human Sciences, Pharmacy, and Veterinary Medicine are home to highly ranked programs that respond to some of the most challenging issues facing us today, focusing on prevention strategies to promote healthy living across the life span, examining the creation of new vaccines and vaccine delivery, and identifying and testing new pharmaceutical treatments for infectious diseases, and testing diseases that can affect humans. OSU is a collaborator in the Oregon Master of Public Health Program (OMPH) in community health, a program ranked second in the nation. The Linus Pauling Institute’s focus on cardiovascular and metabolic diseases, cancer, aging, immune function, and neurodegenerative diseases brings additional strength and focus to this signature area. These, and other, areas of strength position our University for long-term excellence and continued distinction in human health and wellness.

The University will expand its interdisciplinary research and academic programs that investigate the causes of chronic mental and physical diseases and promote strategies for healthy living. OSU’s range of expertise in human and animal health sciences, and its existing interdisciplinary collaborations within its health and life sciences colleges, and research institutes and centers, provides the capacity to investigate the multiple causes of chronic diseases and design health promotion strategies for their prevention. The university’s long history of successfully preparing undergraduate and graduate students as health professionals and its proven track record of collaboration with other universities demonstrates an ability to promulgate knowledge. A singular Medicine, Writing, and Humanities Initiative augments OSU’s holistic approach to health by preparing students to empathize with the sufferings of others, reflect critically on medical knowledge and discourse, create new representations of the medical experience, and confront moral, psychological, and ethical dilemmas. The existing, widespread network of Extension Service connections facilitates the rapid statewide dissemination of novel programs and new approaches that will help establish and maintain a healthy urban and rural population.
Promoting Economic Growth and Social Progress

Consistent with its mission, OSU has long sought to advance effective technological solutions to societal problems and to develop the socially responsible workforce needed to solve problems in Oregon and beyond. OSU achieves these impacts in today's globally competitive economy by nurturing a culture of innovation that encourages research and discovery, and by educating the socially aware, diverse, and creative leadership required for engineering, science, and business.

The presence of a skilled, educated, creative workforce is a prerequisite for generating wealth and producing positive social impact in all sectors of the economy. This workforce is in turn reliant on an advanced research capacity to explore and uncover solutions for the nation's most pressing challenges, matched with a talent for delivering these solutions efficiently.

Numerous governmental and nongovernmental organizations including The National Academias and the Oregon Innovation Council have clearly identified America's urgent need for this skilled work force and the essential underlying research and development capacity needed to ensure regional and national competitiveness.

OSU's strengths in nationally ranked engineering programs and well-known entrepreneurship and family business programs, along with a focus on unique and distinctive areas like nanotechnology, sensor design and interfaces, tsunami wave research, nuclear engineering research, and wood product innovation leverage the culture of creative solutions at OSU and further impact economic growth and social progress.

OSU will capitalize on its broad strengths in technology, engineering, science and business to pursue breakthrough advances in renewable and alternative energy, green building technology, and resource and enterprise sustainability. Several alternative energy companies have recently emerged from OSU, and energetic linkages between business, engineering, and science-dependent colleges are giving rise to new degree programs, strategic partnerships with corporations, and acceleration in the process of bringing discoveries to market. All these activities create advanced learning opportunities for students.

Socially progressive, effective technological and enterprise solutions occur in a context of social justice, supportive communities, and outlets for creativity and expression. By building a diverse community rich and varied in its talents, OSU seeks to attain excellence and to enrich the human spirit in fields ranging from bioengineering to the visual and performing arts, while capitalizing on its world-class engineering and science programs and its distinctive programs in education for entrepreneurship to responsibly address society's most challenging problems.
V. Mission Statement

OSU’s Mission Statement is reformulated to reflect the three new focus areas:

As a land grant institution committed to teaching, research, and outreach and engagement, Oregon State University promotes economic, social, cultural and environmental progress for the people of Oregon, the nation and the world. This mission is achieved by producing graduates competitive in the global economy, supporting a continuous search for new knowledge and solutions, and maintaining a rigorous focus on academic excellence, particularly in the three Signature Areas: Advancing the Science of Sustainable Earth Ecosystems; Improving Human Health and Wellness; and Promoting Economic Growth and Social Progress.

OSU understands diversity is essential to excellence and therefore commits itself to integrating core institutional values of diversity, integrity, respect, social responsibility, and accountability into every dimension of the University’s life. OSU likewise recognizes the global dimensions of most issues, especially in the context of preparing graduates for success in a competitive, interdependent international society.
VI. Phase II Goals, Objectives And Strategies

To meet its aspirations, OSU reconfirms the three fundamental goals that underlie the Plan and adopts a set of institution-wide objectives. OSU will continue to assess progress on goals through selected metrics. Our metrics have been updated to include Phase II targets:

<table>
<thead>
<tr>
<th>Metric</th>
<th>2002-03 Baseline</th>
<th>2007-08 Performance</th>
<th>2012-13 Target</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Degrees Awarded</td>
<td>3894</td>
<td>4232</td>
<td>4566</td>
</tr>
<tr>
<td>First-Year Retention Rate</td>
<td>80.7</td>
<td>80.8</td>
<td>85</td>
</tr>
<tr>
<td>Six-Year Graduation Rate</td>
<td>60.5</td>
<td>62.1</td>
<td>65</td>
</tr>
<tr>
<td>% High-Achieving Oregon High School Graduates</td>
<td>30.5</td>
<td>32.7</td>
<td>38</td>
</tr>
<tr>
<td>% U.S. Minority Students</td>
<td>13</td>
<td>15</td>
<td>18</td>
</tr>
<tr>
<td>% U.S. Minority Faculty</td>
<td>9.2</td>
<td>12.8</td>
<td>15</td>
</tr>
<tr>
<td>Total R&amp;D Expenditures, (million $)</td>
<td>208.1</td>
<td>233.4</td>
<td>296.6</td>
</tr>
<tr>
<td>Dollars Leveraged per Appropriated Dollar for SWPS Research</td>
<td>1.73</td>
<td>1.70</td>
<td>1.75</td>
</tr>
<tr>
<td>Annual Private Giving (million $)</td>
<td>29.3</td>
<td>91.1</td>
<td>92</td>
</tr>
</tbody>
</table>
Phase II Strategic Plan Goals

OSU's goals remain unchanged, except for a slight revision to the first goal to reflect the three new signature areas. Updated initiatives are shown for each goal.

Goal 1

Provide outstanding academic programs that further strengthen performance and pre-eminence in the three Signature Areas of Distinction: Advancing the Science of Sustainable Earth Ecosystems; Improving Human Health and Wellness; and Promoting Economic Growth and Social Progress.

Summary of Initiatives:

- Increase faculty capacity in signature areas and improve faculty strength through coordinated faculty hiring.
- Increase total grants and contracts to expand the impact of research on scholarship and the creative work of faculty, and enhance partnerships with the business and corporate sector, other universities and associations, and non-profit and non-governmental organizations.
- Raise the profile of graduate education at OSU by repositioning existing programs and introducing targeted new programs to support OSU’s three signature areas, and increasing professional and graduate programs to 25 percent of all enrollments.
- Increase the impact of OSU’s regional programs, especially in the Portland metropolitan area and Central Oregon, and raise the university’s visibility nationally and internationally.
- Attract the best students to OSU’s undergraduate and graduate programs through targeted recruitment, increased capacity in the University Honors College, and competitive scholarships and fellowships.
- Create and enhance models of outreach and engagement to serve the needs of the State and promote adoption of these models by other higher education institutions around the globe.
Goal 2

Provide an excellent teaching and learning environment and achieve student access, persistence and success through graduation and beyond that matches the best land grant universities in the country.

Summary of Initiatives:

- Implement a student engagement agenda that enables successful transition to college, adds value to student experiences, and increases leadership and research opportunities in order to raise first-year retention and six-year graduation rates.
- Ensure all teaching faculty contribute to a learner-centered academic experience, and aid them in bringing their scholarship into the learning experience of students.
- Sustain and expand the Bridge to Success program to provide educational opportunities to students from limited financial circumstances.
- Increase participation and success of students from under-represented US minorities and international students, and equalize six-year graduation rates for all student cohorts.
- Re-evaluate the liberal education component (“baccalaureate core”) of the undergraduate education to ensure that all students explore, experience, and reflect upon world views, life situations, and cultures that are different from their own, and create opportunities for students to apply their skills and knowledge to complex problems and real-world challenges.
- Increase access to innovative, relevant educational programs through non-traditional delivery modes that serve place-bound students, address targeted business needs, and promote lifelong learning.
Goal 3

Substantially increase revenues from private fundraising, partnerships, research grants, and technology transfers while strengthening our ability to more effectively invest and allocate resources to achieve success.

Summary of Initiatives:

- Successfully complete the public phase of the Campaign for OSU and position the University for future growth in private fundraising.
- Increase revenues from research grants and contracts, technology transfer, and commercialization activities.
- Collaborate with institutional partners in areas of shared vision to gain efficiencies in program development and delivery.
- Systematically improve the quality and cost effectiveness of business services to strengthen academic programs and student services.

In addition to the goals and objectives listed, there are a number of university-wide initiatives focused on institutional culture and infrastructure that are critical to success. These include:

- Foster a culture of excellence in all the university’s programs.
- Provide a campus environment in which health and wellness are fostered and all community members can grow and do their best.
- Bring synergy and impact to OSU messages through an integrated marketing plan that better presents the university to the general public and targeted constituencies.
- Improve the physical and information infrastructure that supports the education, research and outreach and engagement missions of the university, including construction of the remaining facilities targeted for the public phase of the Campaign for OSU (e.g., the Linus Pauling Science Center, the Student Success Center, and the four Cultural Centers); continued upgrading of classrooms and research facilities; and constant enhancements to the backbone structure of information technology.
- Substantially reduce OSU’s carbon footprint.
- Augment the spirit and practices of shared governance with consistent articulation and application of a compelling vision, long-term perspective, personal empowerment, and clear linkages among responsibility, authority and accountability.
VII. Conclusion

The 2004 Strategic Plan positioned OSU to begin sustained improvement in education, research, and outreach. It set the stage for more productive faculty interactions, improved student learning, and essential private investment into facilities, programs, professorships, and student access. By harnessing these investments into thematic areas with significant potential, OSU was able to leverage institutional resources and dramatically increase measurable results in student performance, institutional quality, faculty renown, and many other areas.

Phase II of the Strategic Plan consolidates and refines the accomplishments of the last five years to accelerate institutional improvement. The three signature areas concentrate the impact of OSU’s scholarship and research, shaping and guiding the efforts of a great university to enhance its contributions to the state, nation, and world, and to continue its leadership in finding innovative solutions to our most important regional and global problems.
A Strategic Plan

for the 21st Century

OREGON STATE UNIVERSITY

OSU
Oregon State University

OREGON STATE UNIVERSITY
An Imperative for Change

The Kellogg Commission on the Future of State and Land-Grant Universities challenged institutions like Oregon State University to maintain their legacy of world-class teaching, research, and public service while responding to the needs of a rapidly changing world. Oregon is experiencing such change as its abundant natural resources and high quality of life continue to attract new residents and Oregonians continue to diversify and strengthen their economy. In addition, today’s global economy is increasingly characterized by high-technology and the need for a more highly-skilled workforce. By bringing best practices and state-of-the-art technology to bear on all sectors of the economy, including the traditional natural resource base, Oregon can enhance its economic growth and help its residents enjoy a higher quality of life.

Where Oregon Stands. The Oregon Council for Knowledge and Economic Development (OCKED) reported in December 2002 that, “Oregon’s economic health and national and global competitiveness is relatively poor.” It found Oregon “ranked in the middle of all the states on key measures that indicate our ability to compete in a global and knowledge-based economy,” adding that “States with high rankings in knowledge-based measures also tend to have higher income, net wealth, and stable business growth.” OCKED also emphasized that over 90 percent of technology jobs exist in industries outside of high-technology itself—e.g., banking, retail, tree nurseries, and hospitals. Thus, the fundamental difference between fast-growth and slow-growth economies is not between the so-called “new” and “old” economies. Fast growth economies apply the latest technologies and best practices to all sectors, not just to high-tech industries.

OSU Role. It is important that OSU serve as an engine for economic growth and social progress in Oregon. Whatever mix of industries characterizes Oregon’s economy, Oregon State University should prepare its students for tomorrow’s jobs while generating and commercializing intellectually-based discoveries and innovations that spur economic growth. No less important is the need to broadly educate students in the liberal arts and sciences. Today’s world requires individuals with the knowledge and perspective to make sensible contributions and choices as world citizens and to understand and thoughtfully analyze societal needs and trends. At no time in our history has the ability to absorb, understand, and evaluate information been so important.

OSU Strengths. Oregon State University is well positioned to help energize Oregon’s economy and improve the lives of all Oregonians. For example, three of its colleges—Oceanic and Atmospheric Sciences, Forestry, and Agricultural Sciences—are ranked among the top 10 in the nation. OSU also ranks 11th nationally in the broad fields of ecology, evolution, and behavioral programs. Students entering our Honors College compare favorably with those listed in U.S. News & World Report’s top 25, and in 2002, members of the University Honors College had an average high school GPA of 3.97 and average SAT scores of 1376.

Our statewide reach is impressive, with the Extension Service delivering community-based education programs in Oregon’s counties and benefiting low-income families, businesses, and others. Our Agricultural Experiment Station’s 14 branches span the state, from Portland to Klamath Falls and from Newport to Ontario. Their programs...
are the pre-eminent source of knowledge for Oregon's agriculture, food system, and natural resource endeavors. The OSU Forest Research Laboratory emphasizes the social and economic benefits of Oregon's forest resources, and its research helped make the secondary wood products industry a growth sector in recent years. OSU units also provide a wide array of direct services, such as testing for the West Nile virus and diagnosing plant diseases.

Our College of Engineering, Oregon's flagship institution for engineering and technology, is embarked on a drive to become one of the nation's top 25 engineering schools. The Linus Pauling Institute focuses on dietary issues, and in collaboration with the Colleges of Agricultural Sciences and Health and Human Sciences is leading the way to healthier, higher-quality lives and important avenues for reducing long-term health care costs. The Hatfield Marine Science Center is one of America's top marine laboratories, with high potential for future growth.

**OSU Challenges.** At the same time, we face substantial challenges:

- A continuously decreasing fraction of our costs is covered by state support. This requires dramatic growth in tuition, private donations, and federal and privately-funded research.
- NIH-based federal research funding is particularly low.
- The OSU Foundation and Alumni Association are in transition. We must establish the organizational and internal infrastructure necessary to successfully complete a major capital campaign.
- Non-competitive compensation exists in some areas and must be raised to attract and retain outstanding faculty and staff.
- Our deferred maintenance needs are high, and our information infrastructure varies in effectiveness—with excellent facilities and backbone structure in some units and poor desktop delivery capabilities in others.
- There is no long-range plan to optimally support and position our range of programs around the state (including OSU-Cascades, the Hatfield Marine Science Center, the Portland metropolitan area, e-Campus learning programs, our programs at Eastern Oregon University, and Extension education programs).
- We lack a prominent international role to complement our study abroad programs.

**Environmental Factors.** Finally, our success in optimizing OSU's contribution will be shaped in part by other factors that affect our working environment:

- Public expectations for stronger programs and services for more students without proportionate increases in state base funding.
- An increased focus on outcomes and accountability.
- The globalization of markets, technologies, information, and knowledge.
- The increasing opportunity and risks involved in translating discoveries and knowledge into commercial applications that influence life in society broadly.
- Advances in information and communication technologies that affect the discovery, presentation, preservation, and communication of knowledge.
- Complex societal problems requiring integrated thinking and learning.
- Changing demographics of society, students, and faculty, as well as different skill sets and expectations.
Oregon State University’s Aspirations and Beliefs

Founded in 1868 as Oregon’s land grant University, Oregon State is a member of the Oregon University System and a public research university strongly devoted to student success. We benefit the people of Oregon and our global society by educating the leaders of tomorrow, extending the boundaries of knowledge, and meeting the most compelling needs of a diverse and complex world. We are the state’s land, sea, and space-grant institution—one of a few universities in the nation with all three designations. In this document, all three descriptors are absorbed in the term “land grant.”

Vision. To best serve the people of Oregon, Oregon State University will be among the Top 10 land grant institutions in America.

Our journey toward this long-term vision will have positive impacts for our students, faculty, staff, and constituents. Our graduates will be competitive with anyone, anywhere, not only in their chosen fields but also in their ability to think broadly, address complex problems, and adapt to diverse environments. Our faculty will be recognized worldwide for their teaching, scholarship, research, and outreach as well as their pursuit of academic and intellectual leadership and integrity. Our staff will excel in providing professional and support services. Partnerships with elementary, secondary, and higher education as well as with government, business, and Oregon communities will add economic and social value for the people and communities of our state. The relevance and impact of our research and scholarship will be second to none. In today’s high-technology global economy and fast-changing world, we will be an engine for economic growth and social progress in Oregon.

Core Values. The following core values are fundamental to our success:

- Accountability. We are committed stewards of the loyalty and good will of our alumni and friends and of the human, fiscal, and physical resources entrusted to us.
- Diversity. We recognize that diversity and excellence go hand-in-hand, enhancing our teaching, scholarship, and service as well as our ability to welcome, respect, and interact with other people.
- Integrity. We practice honesty, freedom, truth, and integrity in all that we do.
- Respect. We treat each other with civility, dignity, and respect.
- Social responsibility. We contribute to society’s intellectual, cultural, spiritual, and economic progress and well-being to the maximum possible extent.

Enabling Conditions. Success in reaching our vision requires us to create a university community that:

- Engages people from every segment of society and prepares them for lifelong learning, discovery, and leadership in an increasingly interdependent, global society;
- Excels in our unique obligation to deliver selected, top-quality professional programs;
• Partners with the public and private sectors in education, research, and the transfer of knowledge to assure that the benefits of discovery are widely disseminated and utilized;
• Inspires student learning and enthusiasm by integrating teaching, scholarship, and outreach;
• Provides students with a nurturing, safe, challenging, and supporting environment, with curricular, co-curricular, and residential experiences—including intramural sports, recreation, and performing arts programs;
• Provides students with linkages to meaningful employment opportunities;
• Sustains a faculty and staff of exceptional talent, a relevant and rigorous curriculum, a physical and technological infrastructure that supports outstanding achievement, and a supportive environment for personal and professional growth and satisfaction among our employees;
• Encourages innovation, creativity, and risk-taking;
• Involves Oregon’s citizens, government officials, and business leaders in addressing the most critical issues facing our state while balancing multiple conflicting values and perspectives;
• Affirms the importance of our programs in Intercollegiate Athletics and endorses a vibrant approach to athletics that promotes competitive success, unwavering integrity, and academic success for participating students; and
• Above all, maintains a commitment to excellence.
Themes

Oregon State has strengths and potential in five multidisciplinary thematic areas that integrate the mission of teaching, research, and outreach that is our charge from the people of Oregon. These robust intellectual themes, which respond to the unique challenges of Oregon’s future, are integral to our vision and constitute signature academic priorities that define the University. These themes span our academic programs and encompass social, cultural, economic, and environmental dimensions.

Accordingly, while OSU will progress in many areas, it will prioritize its academic resources and investments to focus on the following themes.

• **Advancing the arts and sciences as the foundation for scientific discovery, social and cultural enhancement, and progress in the applied professions.** Continuously shifting challenges require creative public policy responses. The diverse disciplines of arts and sciences can positively and measurably strengthen Oregon’s civic, economic, and social foundations through multi-disciplinary undergraduate, graduate, and professional programs and campus/community partnerships. A strong curriculum and basic inquiry in the arts and sciences is the foundation upon which all great universities are built and is strengthened by interdisciplinary connections with professional programs.

• **Understanding the origin, dynamics, and sustainability of the Earth and its resources.** Natural and human-induced changes to the climate of the Earth will have an enormous impact on the economic, political, social, and ecological systems of the Pacific Northwest. Our experience in studying the atmosphere, the oceans, and the earth and its ecology uniquely positions us to create knowledge and understanding that lead to strategies that successfully meet these challenges.

• **Optimizing enterprise, innovation, and economic development.** Oregon needs to jump-start high-tech innovations and build an entrepreneurial climate in which to move those innovations to market. OSU will develop world-class, work-ready engineers and create globally competitive high-impact ideas for products, services, and infrastructure. We will help develop tomorrow’s entrepreneurs, who will drive the success of emerging and growing organizations across the natural resource and technology sectors and build the infrastructure for 21st Century Oregon.

• **Realizing fundamental contributions in the life sciences and optimizing the health and well-being of the public.** As population and health care costs continue to increase, demand for health promotion, disease prevention, therapeutic interventions, and social services are also increasing. OSU is recognized worldwide for its leadership in biosciences research and promoting an understanding of the effects of the environment on health, promotion of healthy lifestyles, and cost-effective delivery of health care. OSU also plays a prominent role in ensuring a safe and bountiful food supply. Around these existing strengths we will build an integrated and novel program focused on the prevention of disease, biomedical discovery and application, and the promotion of health.
• Managing natural resources that contribute to Oregon’s quality of life and growing and sustaining natural resources-based industries. The environmental, social, and economic benefits provided by Oregon’s landscapes, beaches, forests, streams, rangelands, ranches, farms, and marine systems shape our quality of life. Industries like forestry, agriculture, and tourism are important components of the state’s economy. To compete globally and be sustainable, however, these sectors must become increasingly innovative and more environmentally-friendly, changes in which university research and development can play an important part.

A purposeful commitment to excellence in these five thematic areas will help make OSU a Top 10 land grant university. This focus will also help attract and retain talented students, faculty, staff, and other contributors to our mission. It will help educate a new generation of students who can communicate clearly and effectively, think broadly, address and solve complex problems, and adapt to environments enriched by diversity and characterized by constant change.

Specific initiatives will bring together faculty, staff, and students from all appropriate units to increase our impact on communities in Oregon and beyond while encouraging the strong and stable partnerships that can transform the institution. Initiatives that cut across thematic areas and programs, including the University Honors College, International Programs, Extension, and Extended Campus, will further strengthen the University’s impact and contribution to its various constituencies. This plan will help develop our research agenda as well as the alignment and synergy of efforts with the Oregon State University Alumni Association and the Oregon State University Foundation. Finally, focusing on these themes will help attract and invest the public and private resources necessary to build academic programs, community partnerships, and infrastructure that address the pressing economic and social needs of the people of Oregon.

Supporting 20,000 resident students and providing additional programs through our extended campus and outreach, the Corvallis campus will remain the backbone of our University. Key regional operations will include: the Cascades Campus in Bend providing programs in outdoor recreation and tourism management; performing arts and other specialized programs; the Hatfield Marine Science Center in Newport providing programs in estuarine and marine sciences; the Agricultural Experiment Station branch locations doing research in a variety of areas related to agriculture, natural resources, food systems, and environmental sustainability; an integrated Extension Service that is focused on long-term societal issues; and an OSU Center in Portland providing programs in pharmacy and other programs that serve the metro area.

OSU will create an international presence through collaborative partnerships that enhance future global opportunities for education, research and development, and that enable a better understanding of the multicultural world in which our future graduates will live and work. Finally, OSU will seek excellence in creating a nurturing environment through co-curricular activities, including intramural sports and recreation opportunities, intercollegiate athletic programs, and performing arts programs.
Goals and Initiatives

A great deal of valued work takes place in our academic and support units, and we expect progress to continue in a variety of areas, many of them not cited in this plan. That is because a strategic plan by definition is built upon targeting and focus. It cannot and should not capture every aspect of an institution.

By focusing resources and initiatives in support of the five themes, we expect to achieve our vision for the long run and to make substantial progress on our specific goals over the next three to five years. The time required to implement the initiatives that support the goals will vary depending upon budget realities and available resources.

This section presents three goals and a summary of initiatives to achieve them, including initiatives aimed at individual goals and overarching initiatives that contribute to all three goals. Many of these initiatives emerged from the OSU 2007 planning process; some have already been implemented and are not included in this plan. While the vision, values, themes, and goals in this plan will endure, the implementation initiatives will change along with circumstances, and we continue to welcome suggestions on how best to accomplish our goals.

We will continuously assess our progress toward the goals by monitoring the effectiveness of our initiatives through appropriate metrics. We will set short-term targets that will move us toward our long run goals and ultimately to our vision. In implementing our goals and initiatives, we will be guided by our core values of accountability, diversity, integrity, respect, and social responsibility.

GOAL 1. Provide outstanding academic programs that further strengthen our performance and pre-eminence in the five thematic areas.

Building upon existing strengths and centers of excellence, we will focus new investments in areas with the potential to significantly benefit the economic, social, cultural, and environmental future of our communities, state, nation, and world. Over the next 18 months, we will develop specific initiatives and programs for the five themes that will chart our course over the next five years. These initiatives and programs will include greater student involvement in meaningful scholarship activities; deeper and more lasting collaborations within OSU and between OSU and our many academic, corporate and government partners; and a higher visibility in Salem, Portland, and Washington, D.C. These initiatives and programs will guide faculty hires; investments in teaching, scholarship, and outreach; state and federal funding; and the development of a capital campaign.

As measures of progress, we will:

2. **Move the publication index** from 1,381 in 2002–2003 to 1,588 in 2007–2008
3. **Strengthen the entering student profile.** Increase incoming GPA/SAT for undergraduates from 3.46/1079 in 2002–2003 to 3.5/1150 in 2007–2008; increase students of color from 13% to 15%, and international students from 6% to 9%, by 2007–2008

OSU will benchmark our progress toward our Top 10 land grant vision using these peer institutions:

- University of Arizona
- University of California, Davis
- Cornell University
- University of Illinois
- Michigan State University
- The Ohio State University
- Penn State University
- Purdue University
- Texas A&M University
- University of Wisconsin
Summary of Initiatives:

- Fund up to six proposals for significant, integrative programs that advance excellence in the thematic areas.
- Increase the quantity and quality of significant scholarship and high impact research.
- Develop processes that align curricular programs with and advance the five themes.
- Align OSU’s Federal and State Agendas for maximum relevance and funding opportunities.
- Build and sustain faculty strength in thematic areas through coordinated faculty hires.
- Evaluate Extension, Extended Campus, and Outreach programs, and redirect them as needed to advance progress in the thematic areas.
- Develop targeted programs at Cascades, Hatfield Marine Science Center, and Portland.

GOAL 2. Provide an excellent teaching and learning environment and achieve student access, persistence and success through graduation and beyond that matches the best land grant universities in the country.

We will create a dynamic and vibrant learning environment inside and outside the classroom that deeply engages students in the life of the university by connecting them to our primary activities of teaching/learning, scholarship, and outreach. We will pursue initiatives that promote high-level student engagement, provide a relevant and integrated educational experience, and enhance student success. This goal will be augmented by progress in the thematic areas, which will create rich and powerful academic experiences that help students become successful leaders and responsible social contributors.

As measures of progress, we will:

2. Increase the Six-Year Graduation Rate from 58% in 2002–2003 to 62% in 2007–2008
3. Improve postgraduate satisfaction, as measured by an increase in the combined rating of “excellent” and “very good” on the Graduate Satisfaction Survey, from 82% in 2002–2003 to 85% in 2007–2008

Summary of Initiatives:

- Promote teaching as an academic discipline and provide training, resources, and support through two new Centers on campus to enhance teaching, learning, and advising.
- Develop an enrollment management plan that incorporates all of the factors we must balance to produce the outcomes we seek within our unique context. This plan will include admissions and retention policies that promote a diverse educational community and a financial aid program that enables the achievement of our access, diversity, and student profile goals.
• Align curricular and co-curricular programs and support services to respond to the shared and unique needs of our students, promote student development, encourage a broad and diverse educational experience, and support student success.
• Implement curricular approaches that promote course access and allow students to engage in long-range academic planning.
• Pursue efforts to encourage and support student-faculty interaction in a wide range of educational contexts.
• Enable P-16 partnerships, including expanding dual-enrollment agreements with community colleges in the region and providing educational opportunities to P-12 students through pre-college programs and distance education.

GOAL 3. **Substantially increase revenues from private fundraising, partnerships, research grants, and technology transfers while strengthening our ability to more effectively invest and allocate resources.**

Our ability to achieve Goals 1 and 2 depends on our capacity to generate new resources and to redirect existing resources to initiatives and activities that achieve our strategic goals.

Working with the OSU Foundation and the OSU Alumni Association, we will develop and implement a comprehensive University capital campaign. This campaign will attract new gifts to support faculty, programs, and student scholarships as well as to build new facilities that enhance access and excellence. In addition, we will assess our existing administrative structures and processes to reduce costs, improve efficiencies, and enhance the quality of services.

**As measures of progress, we will:**

2. **Increase the annual growth rate of non-state dollars** from 3.2% in 2002–2003 to 5.0% in 2007–2008

**Summary of Initiatives:**

• Develop and successfully complete a University capital campaign.
• Significantly increase federal funding of research.
• Develop technology transfer capabilities, joint ventures, and collaborative partnerships that advance our excellence in the five thematic areas.
• Assess and improve processes in key areas including human resource management, business services, information processing, and space allocation.
• Reduce administrative costs and redirect these resources to academic programs and strategic initiatives.
Overarching Initiatives

This plan also includes overarching initiatives that contribute to all goals. These will promote an institutional environment that empowers faculty and staff to develop and implement new ideas and creates an organizational structure that aligns resources with goals and provides accountability. These overarching initiatives can be summarized as follows:

- Implement an institution-wide framework for employee performance and career development.
- Develop shared and sustained leadership with consistent articulation of a compelling vision, long-term perspective, personal empowerment, and a clear link between authority, responsibility, and accountability.
- Configure academic units, centers, institutes, programs, support services, and cross-cutting efforts to maximize contribution to our goals while achieving efficient delivery of services.
- Implement a cohesive and coordinated assessment program that identifies program/unit-level outcomes and mechanisms to measure results and use them to improve programs and services.

The University has achieved significant success with two recent organizational reconfigurations that followed detailed planning by members of the faculty, OSU leadership, students, staff, and other stakeholders: Establishment of the College of Health and Human Sciences and the re-emergence of the School of Education. These examples suggest that additional gains are attainable through further reconfiguration. Such further integration of existing units can complement the interdisciplinary, collaborative culture envisioned by the development of thematic areas and enhance opportunities to attract new resources. It can also provide optimal operational efficiencies when organizational units are sized to balance economies of scale with responsive service and provide opportunities to redirect existing resources to support core activities.

The University will review academic programs to insure that they have the appropriate critical mass of faculty in tenure track positions to credibly provide the breadth and depth of quality in each program that is appropriate for a Top 10 land grant University. Further, the proportion of tenure track to fixed term faculty should be sufficient to protect academic freedom and program integrity.
Next Steps

The Office of the Provost and Executive Vice President will lead and coordinate the implementation and assessment of this strategic plan. The Provost will work with the Provost’s Council, the Faculty Senate, and other entities to ensure that the implementation process moves forward and is periodically assessed and revised, and to establish individual and unit accountability for the success of the plan. A detailed implementation plan will be completed by July 2004.

Other next steps will include:

- Alignment of all existing college, school, and academic support plans with this University plan.
- Development, where none now exists, of new college, school, and academic support plans.
- Decisions regarding strategic investments for FY04 and beyond.
- Creation of an annual strategic indicators report and an annual plan report card.
- Budget discussions each spring that focus on the allocation of resources to implement the University, college, and support unit plans.

Prioritization will include an RFP process that encourages proposals for funding that will advance our strategic intent. A select group of preeminent faculty and administrators will advise the Provost and Executive Vice President who, in consultation with the President, will make decisions on resource allocation through an open, transparent, and competitive process and in the best interest of the University.

All University leadership, including the President, Provost, Vice Presidents, Vice Provosts, Deans, Directors, and Department Chairs/Heads, in consultation with Senate leaders, faculty, staff, and students, must make the hard decisions necessary to implement this plan and must be held accountable. Realizing our aspirations for this great University will require us to consolidate and/or eliminate activities as well as launch new initiatives. The implementation plan must begin that process. Ultimately, success will depend upon our willingness to remain on course, adjusting our initiatives but not our aspirations. ✤