

## **Performance Targets and Other Institutional Goals for 2003-04**

As part of the annual Performance Review Process, which was revised in July 2003, the Board will review with each president the institution's targets for the OUS key performance indicators (KPI) at a regular meeting in the fall of each year. The institutional reports to be considered by the Board at this meeting focus on recalibrating interim targets for 2003-04 and 2004-05 and setting five-year targets for 2007-08. The Performance Review Process also includes an annual report of performance results against targets to the Board at its regular meeting in July of each year.

### Background

OUS began conceptualizing a performance measurement system in response to the legislative mandate in 1997 to adopt performance measures and indicators for the four broad goals adopted by the Board of Higher Education in January 1997. These four goals are access, quality, employability, and effectiveness. In the following years, the practical problems of designing a performance measurement system were considered and deliberated by the Board, Chancellor, and institution presidents and vice presidents in numerous public forums including meetings of the Board, Presidents Council, Academic Council, and Administrative Council. Performance measurement had to be acceptable to legislators, the Board, and educators alike. The advice was to build the OUS performance measurement system upon existing undergraduate assessment and data-reporting systems. The challenge was, and continues to be, integrating performance measurement with (what was then) the new Resource Allocation Model, funding priorities, and strategic plans for the System and institutions.

The OUS performance measurement system encompasses several processes:

- Using the broad goals to guide the selection of measures and indicators;
- Adopting key performance indicators (KPIs) for institutional attainment of these goals;
- Selecting KPIs that campuses share in common to permit data aggregation and reports for System-level accountability to external audiences;
- Requiring each campus to select performance measures that reflect the unique vision, strategic directions, and critical features of an institution;
- Setting targets for improving performance that recognizes mission differentiation, performance baseline trends, focused improvement efforts, and performance of peer institutions;
- Representing targets in a range to reflect sustaining current growth or accelerating growth (i.e., low and high targets);
- Recognizing an institution's responsibility for designing and implementing improvement efforts and the Board's responsibility to hold institutions accountable for results;
- Phasing in the number of KPIs requiring improvement targets;

- Identifying sources of data and collecting data for each KPI to ensure consistency and reliability;
- Communicating performance results to various audiences;
- Adjusting or changing future targets based on an evaluation process and understanding of limitations and constraints; and
- Reviewing institution goals and targets with the Board and Chancellor every year.

The Board wanted to structure a conversation around the targets to gain a better understanding about the key drivers for success and the risks to achieving success for each institution. For each institution, the supplementary materials include a President's Statement, Target Summary, and Target Detail for the five common KPIs (of the 12 KPIs) and two mission-specific indicators for each institution. The presidents will address these targets as well as other institution goals critical to attaining the vision and strategic directions articulated for each campus.





**Oregon  
University  
System**

## **Performance Indicator Targets and Other Institutional Goals, 2003-04**

**OFFICE OF PLANNING  
P.O. Box 3175  
Eugene, OR 97403  
Prepared for the  
Oregon State Board of Higher Education  
November 21, 2003**

**PERFORMANCE INDICATOR TARGETS AND OTHER INSTITUTIONAL GOALS**  
**EASTERN OREGON UNIVERSITY**  
President Dixie Lund

*Performance Indicators*

Eastern Oregon University (EOU) continues to demonstrate steady progress in following its mission to be a student-centered, selective public liberal arts institution with distinctive professional programs. Such progress is demonstrated in achievements that are reflected in both shared System performance indicators (persistence, total degree production, and high graduate satisfaction levels), and mission-specific indicators (high school admits with high GPAs and Cornerstone experiences). Also noteworthy is our continued increase in already impressively high satisfaction marks from graduates. From the most recent survey in 2001, 88.3 percent of respondents rate their educational experience as either “excellent” or “very good” indicating high satisfaction with their educational experience at EOU.

Institutional priorities and themes continue to be focused on (1) administrative efficiencies to respond to a continual decline in state resource allocations and (2) targeted enrollment growth to enhance both the quality of our student body and availability of capacity in specific disciplines. For example, significant growth in business and education majors continues, but our recruiting efforts on new students are focused on those who are interested in mathematics, technology, and the sciences, especially in interdisciplinary areas such as the new biochemistry and media arts majors.

*Other Institutional Goals*

EOU's highest priority for the next two biennia will be to maintain quality programs, services, faculty, and students as resources are reallocated as necessary in order to continue to grow. In the past, we were able to look ahead to generalized growth. However, in the era we now face, we must be very strategic in identifying the specific areas in which we can accommodate growth, knowing that we must maximize under-utilized space and faculty loads. We recognize, however, that there are challenges in trying to recruit students to those documented shortage areas the System has recognized (teacher education in mathematics and science) if (1) these are not the majors that students wish to pursue and (2) resources are not sufficient to entice such enrollments into these areas. Additional funding to support fee remissions and/or other forms of scholarship to attract the best and the brightest into these majors is needed.

For the past several years, fund-raising efforts have been focused on obtaining capital to support and equip the new wing of our state-of-the-art Science Center. We will, upon conclusion of that campaign this spring, be redirecting such fund-raising efforts toward increased scholarship support for students. We must try to alleviate the growing financial burden being placed on them as state general fund support declines and tuition increases continue.

EOU has always been involved in partnerships with other entities, but we will and already are, increasingly seeking to form new partnerships with economic development constituents. These relationships provide synergy to our mutual interests in driving the

## **Performance Indicator Targets and Other Institutional Goals for 2003-04**

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recovery of the business climate and employment levels throughout rural Oregon, particularly in Eastern Oregon. We anticipate new public/private partnerships to emerge from these activities, and will seek to be the educational leader in providing faculty and staff expertise to such enterprises. Despite removal of state funding for the Eastern Oregon Collaborative Colleges Center, we enjoy a healthy relationship with Treasure Valley Community College (TVCC) and Blue Mountain Community College (BMCC), and we will continue to pursue cooperative agreements to benefit our shared student bodies. We are also directly involved with a federal economic development University Center grant and we expect to return that Center to its former campus home.

## Performance Indicator Targets and Other Institutional Goals for 2003-04

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### Eastern Oregon University Performance Indicator Target Summary, 2003-04

	<i>Common to All Institutions</i>					<i>Selected by Institution</i>		
	Retention <sup>1</sup>	Total Degrees <sup>2</sup>	Shortage Degrees <sup>3</sup>	Graduate Rating <sup>4</sup>	R & D Expend <sup>5</sup>	Top HS Grads <sup>6</sup>	Cornerstone Experiences <sup>7</sup>	
<b>Results</b>								
1999-00	65.6	429	13	84.2	\$1.8	40.3	2.2	
2000-01	64.9	448	18	88.3	\$2.1	35.5	2.4	
2001-02	65.4	458	not available	not available	\$3.3	36.4	2.1	
2002-03	Pending	pending	pending	pending	pending	40.3	2.2	
<b>Targets</b>								
2002-03 (set 2001)	Low	65.8	412	14	76.9	\$2.3	36.5	2.9
	High	68.8	424	24	78.8	\$2.5	37.5	3.2
2003-04 (set 2001)	Low	66.4	416	17	77.8	\$2.3	37.0	2.3
	High	70.4	432	30	80.6	\$2.5	38.5	2.6
2004-05 (set 2003)	Low	67.0	460	20	83.0	\$3.0	39.0	2.3
	High	72.0	470	36	88.0	\$3.5	41.0	2.5
2007-08 (set 2003)	Low	69.0	480	22	85.0	\$3.5	41.0	2.6
	High	74.0	490	38	90.0	\$4.0	43.0	2.8
<b>Low Target to Last Results</b>								
T 04-05	Low	1.6	2	2	-5.3	-\$0.3	-1.3	0.2
T 07-08	Low	3.6	22	4	-3.3	\$0.2	0.7	0.5
<b>High Target to Last Results</b>								
T 04-05	High	6.6	12	18	-0.3	\$0.2	0.7	0.4
T 07-08	High	8.6	32	20	1.7	\$0.7	2.7	0.7

**Notes:**

<sup>1</sup> Percent of first-time, full-time freshmen who return for a second year at EOU.

<sup>2</sup> Total degrees (bachelor's and master's) awarded.

<sup>3</sup> EOU selected teaching endorsements in mathematics and sciences. Coding discrepancies delayed baseline development.

<sup>4</sup> Percent of EOU bachelor's degree recipients rating the quality of the overall experiences as "very good" or higher on a 5-point scale (with 5 as "excellent").

<sup>5</sup> Research and development expenditures using grant funds from external sources (e.g., federal, private).

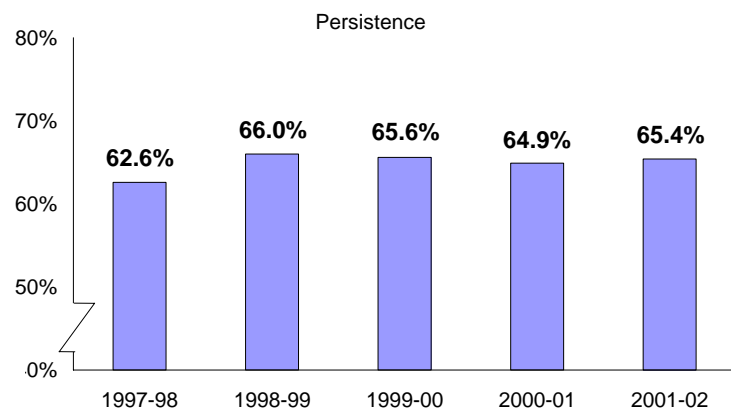
<sup>6</sup> Percent of entering freshmen at EOU with high school GPAs of 3.5 or higher.

<sup>7</sup> Average number of four curricular enhancements completed by bachelor's graduates in given year.

## Performance Indicator Targets and Other Institutional Goals for 2003-04

### Eastern Oregon University Performance Indicator Target Detail

**Freshman Persistence/Retention.** Full-time freshmen that return to EOU for a second year.<sup>1</sup>



Targets		
Year	Low Target	High Target
2002-03	65.8%	68.8%
2003-04	66.4%	70.4%
2004-05	67.0%	72.0%
2007-08	69.0%	74.0%

#### Performance Trend:

- EOU retention increased by three percentage points between 1997-98 and 2001-02.
- The largest gain in the five-year period (between 1997-98 and 1998-99) is related to EOU's decision to raise admission standards for entering freshmen (minimum high school GPA). This gain was followed by three stable years.

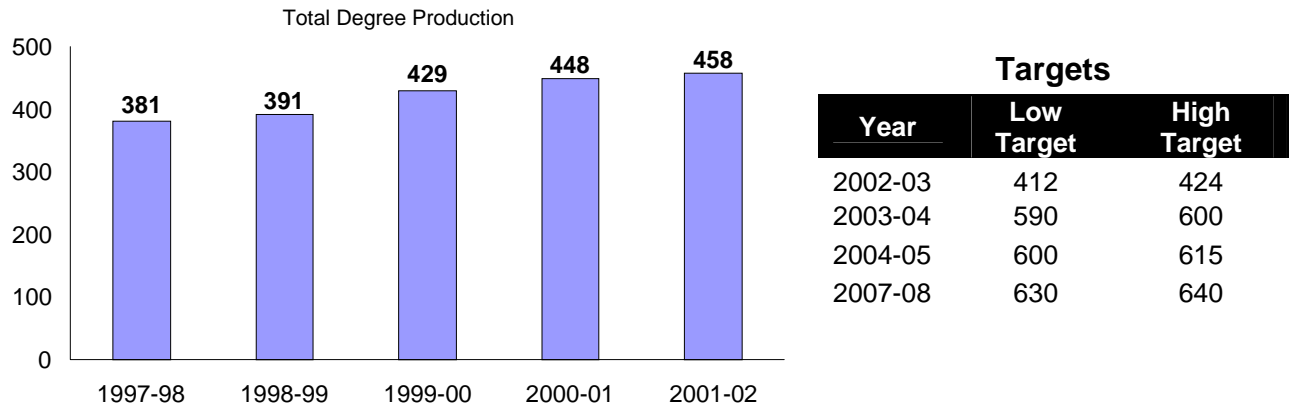
#### Rationale for Future Targets:

Retention is projected to increase due to programs targeted at improving study habits and advising. ChemExcel and MathExcel are programs aimed at improving student study habits in mathematics and chemistry. Assessment shows these programs are resulting in higher success rates in mathematics and chemistry, two majors in which Eastern has had lower rates of persistence. New academic standing policies have been put in place that require students earning less than 2.0 for two or more terms to meet with an advisor prior to registration and participate in a mandatory intervention program. In addition, a new student-centered academic advising program was implemented this year.

<sup>1</sup> For example, data for 2001-02 reflect the number of EOU freshmen who entered in fall 2001 and were still enrolled at EOU in fall 2002.

Eastern Oregon University  
Performance Indicator Target Detail

**Total Degree Production.** Numbers of bachelor’s and master’s degrees awarded in a given academic year.



Performance Trend:

- EOU saw an absolute growth of 77 degrees in 2001-02 compared to 1997-98, representing a 20 percent increase in productivity.

Rationale for Future Targets:

Significant growth is projected in the number of degrees awarded. Because of exceptional enrollment growth and increased freshman persistence, degree production is expected to increase over the next three years.

## Performance Indicator Targets and Other Institutional Goals for 2003-04

### Eastern Oregon University Performance Indicator Target Detail

**Teacher Licenses Produced in Mathematics and Science** <sup>2</sup> Number of degrees produced in this Oregon shortage area.



**Performance Trend:**

- With only two data points on the baseline, it appears EOU's production of teacher endorsements in mathematics and science fields has increased.

**Rationale for Future Targets:**

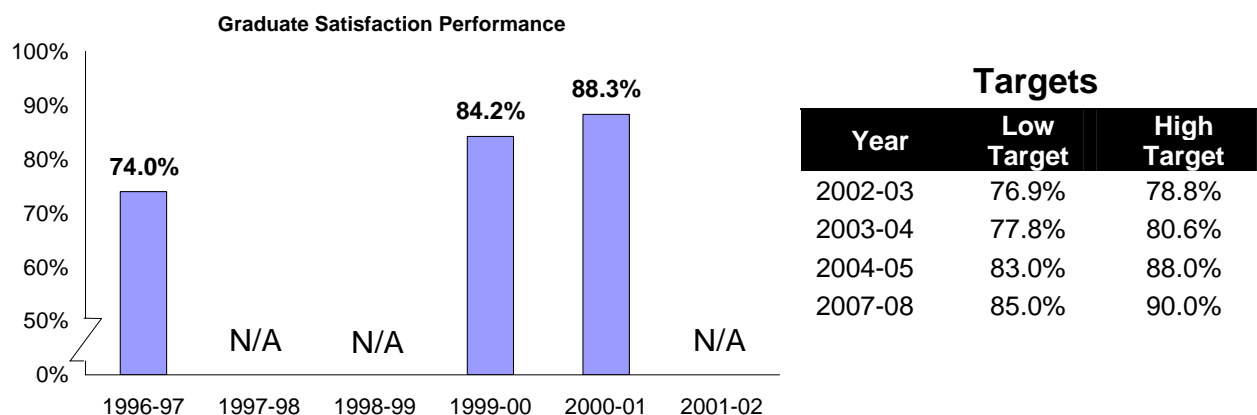
Eastern is currently reconsidering this performance indicator. There is no doubt the state has a shortage in this area. Without incentives, such as scholarships, tuition waivers and grants, however, it is uncertain if Eastern can attract a significant number of teachers to pursue this endorsement. A decision on this indicator will be made by December 15, 2003, after further discussions on campus and with OUS.

<sup>2</sup> Data for the earlier years are extracted from reports prepared jointly by OUS Academic Affairs and the Teacher Standards and Practices Commission (TSPC) based on the number of individuals securing endorsements from TSPC in a given year. These reports are prepared every two years. The total is a duplicated headcount. A person with endorsements in two shortage area disciplines (chemistry and biology) would be counted twice. A person with endorsements in mathematics and English would be counted once.

## Performance Indicator Targets and Other Institutional Goals for 2003-04

### Eastern Oregon University Performance Indicator Target Detail

**Recent Graduate Satisfaction.** Recent bachelor's degree recipients were asked to rank the overall quality of their educational experience on a scale of 1 to 5 (with 1 as low and 5 as high). Scores reported include 4s and 5s combined.<sup>3</sup>



#### Performance Trend:

- The rating of the overall quality of the education received at EOU has increased steadily in the three survey periods, with an increase of 14 percentage points of students rating the experience "very good" or "excellent" in 2000-01 compared to 1996-97.

#### Rationale for Future Targets:

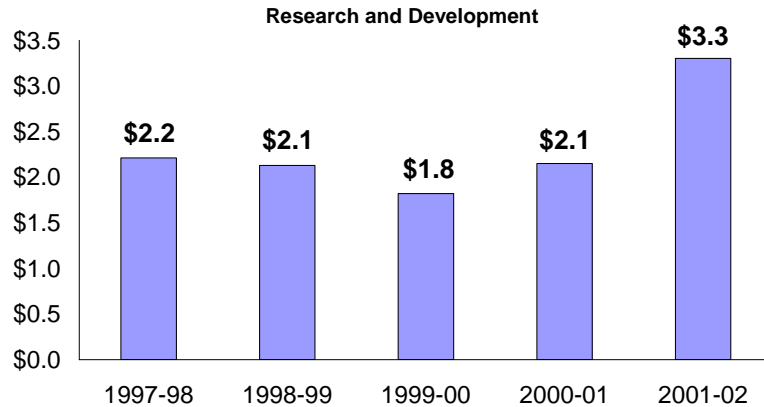
EOU's goal is to maintain these very high marks in graduate satisfaction and focus improvement on areas of the survey that have not received consistently high ratings. Results from EOU's 2001 survey exceeded the prior high target of 82.5 percent for this indicator. Since that time, tuition has increased and the tuition plateau will be eliminated effective Winter 2004. These substantive changes may slow increases in graduate satisfaction.

<sup>3</sup> In the future, this survey will be conducted every other year by OUS Office of Planning.

## Performance Indicator Targets and Other Institutional Goals for 2003-04

### Eastern Oregon University Performance Indicator Target Detail

**Research and Development (R&D).** Annual expenditures for research, training/teaching, and similar activities supported by grants from federal and private sources (dollars in millions).



**Targets (\$ in Millions)**

Year	Low Target	High Target
2002-03	\$2.3	\$2.5
2003-04	\$2.3	\$2.5
2004-05	\$3.0	\$3.5
2007-08	\$3.5	\$4.0

**Performance Trend:**

- A 57 percent increase between 2000-01 and 2001-02 is likely due to an anomaly in expenditure patterns and project cycles. The other years reflect more consistent performance.

**Rationale for Future Targets:**

EOU currently exceeds its previous high target set for 2003-04. Growth in this indicator is primarily due to gifts, grants, and contracts related to equipment for EOU's new science building. This rate of growth will likely not occur in the future because equipment needs will stabilize and because of the shortage of teaching faculty available to cover for reassigned time to conduct research or to administer grant activity.

## Performance Indicator Targets and Other Institutional Goals for 2003-04

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### Mission Specific Indicators Selected by EOU Performance Indicator Target Detail

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**High-Achieving High School Graduates.** Proportion of newly admitted freshmen with high school grade point averages (GPA) of 3.5 or higher.

Year	Performance	Low Target	High Target
1999-00	40.3%		
2000-01	35.5%		
2001-02	36.4%		
2002-03	40.3%	36.5%	37.5%
2003-04		37.0%	38.5%
2004-05		39.0%	41.0%
2007-08		41.0%	43.0%

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#### Performance Trend:

- EOU increased the proportion of high school graduates with high GPAs admitted to EOU by nearly five percentage points in three years.

#### Rationale for Future Targets:

One of EOU's goals is to be a selective undergraduate institution. From 1995 to 2002, the proportion of first time freshmen with high school GPAs 3.5 and above has ranged from 35 percent to 40 percent. Because access for Oregonians is also an important goal for all OUS institutions, EOU's proportion of high achieving high school graduates will likely not substantially increase beyond the target set for 2007-08.

Mission Specific Indicators Selected by EOU  
Performance Indicator Target Detail

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**Cornerstones of an EOU Experience.** The average number of undergraduate curriculum enhancements completed by EOU graduates. The four components articulated in 1999 include Service Learning, International Experience, Internship, and Undergraduate Research.

Year	Performance	Low Target	High Target
1999-00	2.2		
2000-01	2.4		
2001-02	2.1		
2002-03	2.2	2.9	3.2
2003-04		2.3	2.6
2004-05		2.3	2.5
2007-08		2.6	2.8

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Performance Trend:

- The baseline reflects small changes after the implementation of the Cornerstone enhancement.

Rationale for Future Targets:

Experiential learning is expected to increase. Cornerstones are unique to the undergraduate educational experience at EOU. There are four elements required to achieve Cornerstone completion (research, international exposure, service learning, and internship). A change in the leadership of the Cornerstone Program between 2001 and the present, coupled with tighter criteria for satisfying the Cornerstones have hampered our ability to make effective comparisons across the years. Even with such changes, however, we are still able to report an increase from 2.1 average Cornerstones completed in 2001-02 to 2.2 in 2002-03.

**PERFORMANCE INDICATOR TARGETS AND OTHER INSTITUTIONAL GOALS**  
**OREGON INSTITUTE OF TECHNOLOGY**  
President Martha Anne Dow

*Performance Indicators*

The targets set by OIT for the OUS performance indicators reflect our strategic goals for 2003-2005. The alignment of Oregon benchmarks with OUS and OIT are exemplified in the following priority goals.

1. Student success continues to be the number one goal for OIT. Our main strategic initiatives have addressed improving retention (freshmen persistence) and graduation rates through strengthening advising, tutoring, and mentoring programs. The success of OIT learning communities and freshmen seminars is measured by persistence and retention data.
2. OIT is committed to program excellence and student-centered service. The graduate satisfaction ratings for OIT are at 93 percent. Our goal is to continue to deliver quality programs to maintain this rating.
3. OIT will emphasize continuing fiscal and operational efficiency. Goals include increasing the alumni participation in the annual fund from 10 percent to 20 percent over the next five years. An overall strategy will focus on annual giving increases in the unrestricted category to assist OIT during times of declining revenue. By 2004-05 we have set a target for \$3 million in gifts, grants, and contracts.
4. By increasing capacity in targeted programs, OIT will enhance the number of degrees awarded in engineering, computer engineering technology, and the health technologies during the next five years. Through the development of a Center for Health Professions, OIT will double the number of graduates in the allied health programs to assist with the crisis in the healthcare workforce. This goal is dependent on new resources.
5. Increasing the number of women enrolled in engineering related fields is a special goal. Pre-college programs and scholarships will assist in meeting this objective.

*Other Institutional Goals*

1. The success of OIT depends on quality faculty. A faculty compensation plan and strategy are currently under development. This plan will formalize specific improvement initiatives over the next five years.
2. Two centers of excellence, the Center for Health Professions and the Oregon Renewable Energy Center, are key initiatives for OIT. The performance targets include the following: double the enrollment in the allied health programs to meet

## **Performance Indicator Targets and Other Institutional Goals for 2003-04**

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workforce demands, and ten significant partnerships will be developed to extend healthcare education throughout Oregon.

The performance objectives for the Oregon Renewable Energy Center are to obtain a national ranking and enhance undergraduate applied research. The performance targets also include the development of two key research projects with intellectual property licenses.

The Oregon Benchmarks and vision that are reflected in the goals of: 1) quality of jobs for Oregonians, 2) engaged communities, and 3) healthy sustainable surroundings fit OIT's mission, vision, and strategies extremely well. The OIT vision is as follows:

Oregon Institute of Technology provides Oregon with graduates who have the knowledge and skills to excel in an increasingly technological workplace. We will be known for our commitment to teaching excellence, applied research, and economic development. We measure our success by the accountability of our graduates and our ability to build economic opportunities. Providing access and quality programs to the students of Oregon is the theme throughout the OIT Strategic Plan. The document, "President's Conversation with the Board" of October 17, 2003, provides the details of our strategic goals and long-range objectives.

## Performance Indicator Targets and Other Institutional Goals for 2003-04

### Oregon Institute of Technology Performance Indicator Target Summary, 2003-04

		<i>Common to All Institutions</i>				<i>Selected by Institution</i>		
		Retention <sup>1</sup>	Total Degrees <sup>2</sup>	Shortage Degrees <sup>3</sup>	Graduate Rating <sup>4</sup>	R & D Expend <sup>5</sup>	Women in Engineering Fields <sup>6</sup>	Bachelor's Completion Rate <sup>7</sup>
<b>Results</b>								
1999-00		63.4	330	139	90.4	\$2.2	not required <sup>8</sup>	31.5
2000-01		73.3	328	163	93.0	\$2.6	not required	36.2
2001-02		68.9	360	178	not available	\$1.9	129	41.1
2002-03		pending	pending	pending	pending	pending	101	pending
<b>Targets</b>								
2002-03 (set 2001)	Low	70.2	304	156	85.5	\$2.0	124	35.0
	High	71.4	313	165	86.9	\$2.1	130	36.0
2003-04 (set 2001)	Low	70.6	307	159	86.2	\$2.2	130	36.0
	High	72.2	319	171	88.4	\$2.3	136	37.0
2004-05 (set 2003)	Low	70.0	365	187	93.0	\$2.2	106	42.0
	High	73.0	375	225	93.0	\$3.0	117	43.0
2007-08 (set 2003)	Low	71.0	370	196	93.0	\$2.5	112	43.0
	High	75.0	390	283	93.0	\$3.5	135	45.0
<b>Low Target to Last Results</b>								
T 04-05	Low	1.1	5	9	0.0	\$0.3	5	0.9
T 07-08	Low	2.1	10	18	0.0	\$0.6	11	1.9
<b>High Target to Last Results</b>								
T 04-05	High	4.1	15	47	0.0	\$1.1	16	1.9
T 07-08	High	6.1	30	105	0.0	\$1.6	34	3.9

**Notes:**

<sup>1</sup> Percent of first-time, full-time freshmen who return for a second year at OIT.

<sup>2</sup> Total degrees (bachelor's and master's) awarded.

<sup>3</sup> OIT selected engineering and engineering-related fields.

<sup>4</sup> Percent of OIT bachelor's degree recipients rating the quality of the overall experiences as "very good" or higher on a 5-point scale (with 5 as "excellent").

<sup>5</sup> Research and development expenditures using grant funds from external sources (e.g., federal, private).

<sup>6</sup> Women enrolled in traditionally male-dominated engineering fields.

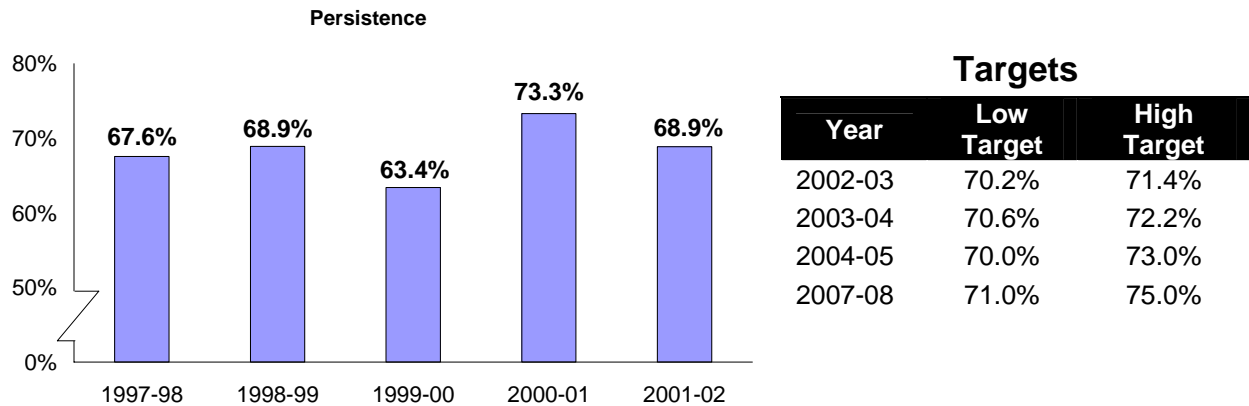
<sup>7</sup> Percent of entering freshmen that graduate by the end of six years.

<sup>8</sup> Mission-specific indicator introduced in 2001, data and targets are optional.

## Performance Indicator Targets and Other Institutional Goals for 2003-04

### Oregon Institute of Technology Performance Indicator Target Detail

**Freshman Persistence/Retention.** Full-time freshmen that return to OIT for a second year.<sup>4</sup>



**Performance Trend:**

- Student retention at OIT appears to be trending upwards with one percentage point change between 1997-98 and 2001-02 masking a ten percentage point gain between 1999-00 and 2000-01.

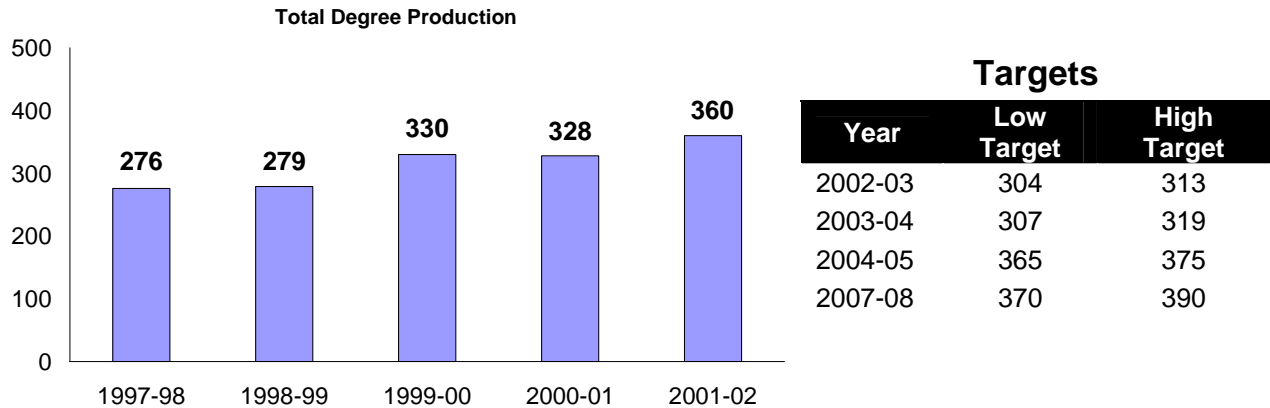
**Rationale for Future Targets:**

With an aggressive retention program, we hope to support our high level of retention and continue to increase it. Our Tech Opportunities Program (TOP) provides support for under-prepared students. This contributes to the high target shown. However, we currently have limited access to many of our upper division professional programs. This may limit the persistence of our students, since they may be required to transfer to other schools to achieve their career objectives. This is reflected in the low targets shown.

<sup>4</sup> For example, data for 2001-02 reflect the number of OIT freshmen who entered in fall 2001 and were still enrolled at OIT in fall 2002.

Oregon Institute of Technology  
Performance Indicator Target Detail

**Total Degree Production.** Numbers of bachelor's degrees awarded in a given academic year.



Performance Trend:

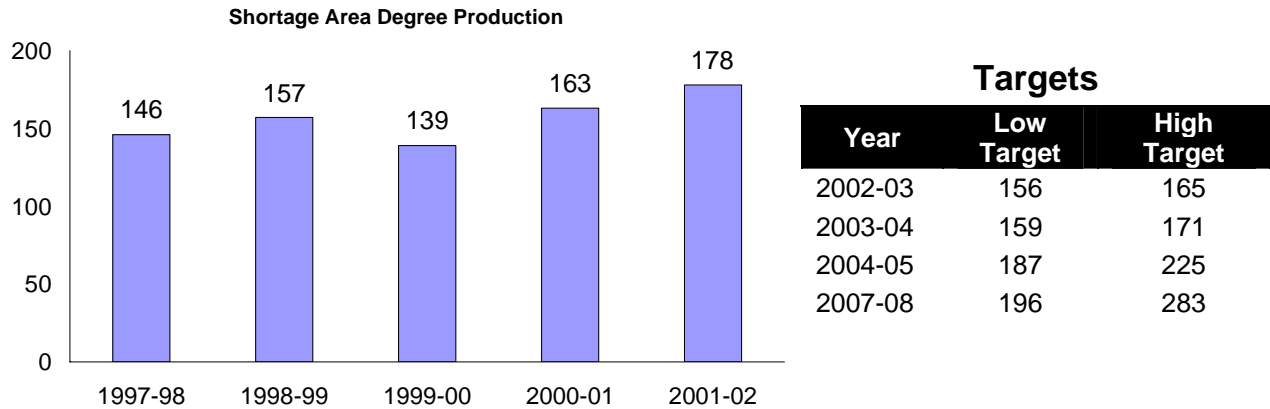
- OIT awarded 84 more degrees in 2001-02 than in 1997-98, representing a 30 percent increase.

Rationale for Future Targets:

We believe that graduates will track with enrollment increases, which are projected to be 1.5 percent per year for our high targets. However, if increased tuition costs drive down our enrollment, we will be relatively flat. Hence, we have set a low target of 0.5% percent growth.

Oregon Institute of Technology  
Performance Indicator Target Detail

**Degrees Produced in Engineering and Computer Science.** Number of degrees produced in this Oregon Shortage Area.<sup>5</sup>



Performance Trend:

- OIT steadily increased its production of degrees in engineering, engineering-related technologies and computer science fields by 32 degrees in 2001-02 compared to 1997-98, representing a 22 percent increase.

Rationale for Future Targets:

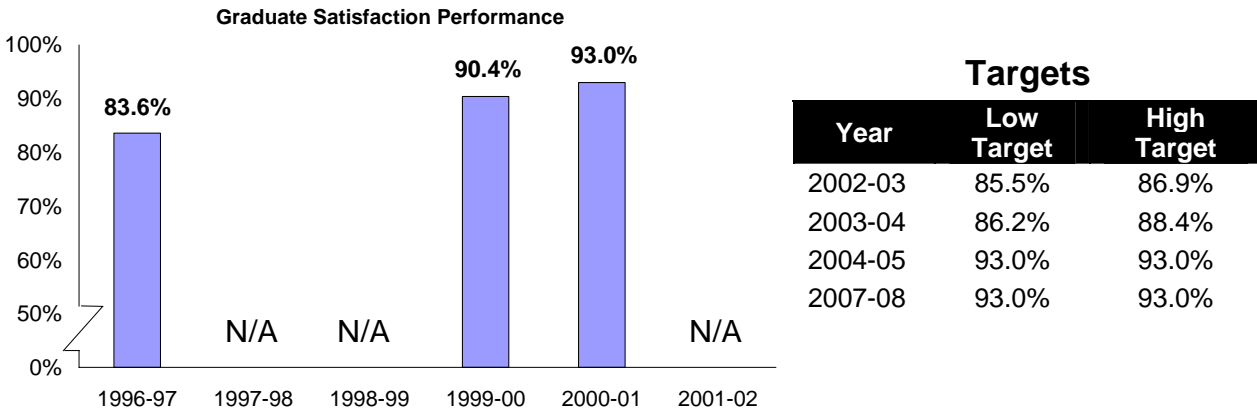
We are strongly committed to growing degree productivity in these areas with ETIC funding. With the funding that has been provided, we expect to grow at 8 percent per year over the baseline year. However, if ETIC funding is only available at a reduced level, we can only expect to grow at 5 percent per year in these high priority areas.

<sup>5</sup> OIT also produced associate's degrees, which are not included in this report.

## Performance Indicator Targets and Other Institutional Goals for 2003-04

### Oregon Institute of Technology Performance Indicator Target Detail

**Recent Graduate Satisfaction.** Recent bachelor's degree recipients were asked to rank the overall quality of their educational experience on a scale of 1 to 5 (with 1 as low and 5 as high). Scores reported include 4s and 5s combined.<sup>6</sup>



#### Performance Trend:

- OIT improved nine percentage points in percent of recent graduates rating the overall quality of OIT as “very good” or “excellent” in 2000-01 compared to 1996-97. In attaining over 90 percent on this indicator, OIT would not be setting targets to improve but to sustain already high performance.

#### Rationale for Future Targets:

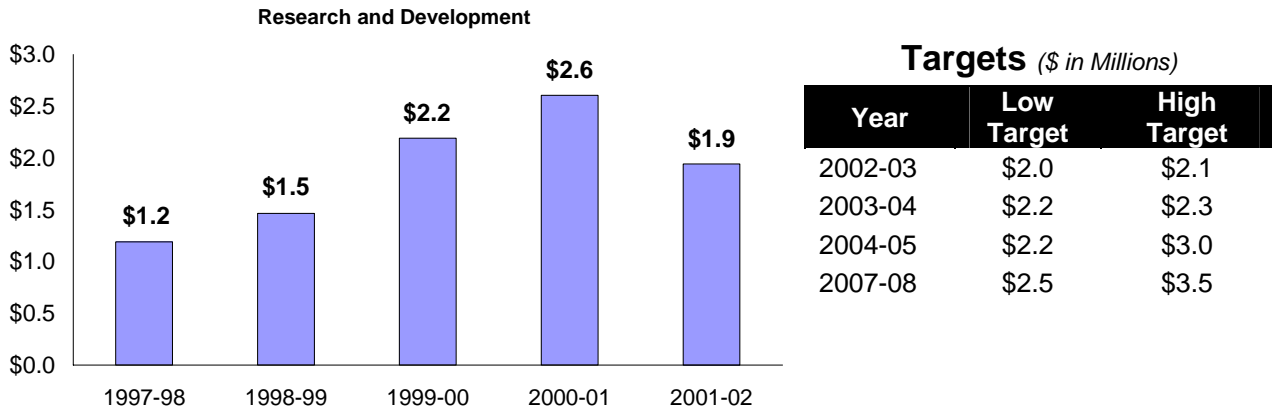
OIT has strong, ‘hands-on’ professional programs in engineering, technology, management, and health professions. We have excellent interactions between faculty members and students. Thus, we have a high level of graduate satisfaction and believe that we can continue to sustain this high level.

<sup>6</sup> In the future, this survey will be conducted every other year by OUS Office of Planning.

## Performance Indicator Targets and Other Institutional Goals for 2003-04

### Oregon Institute of Technology Performance Indicator Target Detail

**Research and Development (R&D).** Annual expenditures for research, training/teaching, and similar activities supported by grants from federal and private sources (dollars in millions).



**Performance Trend:**

- OIT had been steadily increasing in R&D expenditures, but declined between 2000-01 and 2001-02.

**Rationale for Future Targets:**

With the growth of activities in our centers of excellence in renewable energy and health professions, we believe that we can increase funding by 5 percent per year. Our low targets reflect flat funding or only slight increases and are predicated on slow progress in developing OREC and CHP.

Mission Specific Indicators Selected by OIT  
Performance Indicator Target Detail

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**Women Enrolled in Engineering-Related Fields**

Year	Performance	Low Target	High Target
2000-01	N/A		
2001-02	129		
2002-03	101	124	130
2003-04		130	136
2004-05		106	117
2007-08		112	135

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Performance Trend:

- The number of women enrolled in engineering-related fields declined between 2001-02 and 2002-03.

Rationale for Future Targets:

Critical drivers for meeting these targets are the abilities and interests of recent high school graduates in mathematics and sciences. Increasing the number of women in these fields requires a P-16 partnership.

We have a number of programs focused on recruitment and retention of women in engineering-related fields: WISE, Learning Communities, and an-NSF funded program for development of female faculty members for engineering. With these efforts, a 5% percent growth over the baseline enrollment each year is our target. If we have limited success due to funding limitations, we can only expect to grow at the rate of our enrollment increases—0.5 to 1.5 percent per year—hence, our low projection.

## Performance Indicator Targets and Other Institutional Goals for 2003-04

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### Mission Specific Indicators Selected by OIT Performance Indicator Target Detail

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**Bachelor's Degree Completion.** Percent of freshmen who enter and complete their degrees at OIT within six years.

Year	Performance	Low Target	High Target
1997-98	23.5%		
1998-99	32.2%		
1999-00	31.5%		
2000-01	36.2%		
2001-02	41.1%		
2002-03		35.0%	36.0%
2003-04		36.0%	37.0%
2004-05		42.0%	43.0%
2007-08		43.0%	45.0%

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Performance Trend:

- OIT is steadily improving, increasing bachelor's degree completion by 75 percent since 1997-98.

Rationale for Future Targets:

Strong retention efforts on campus are expected to lead to steady improvement in these rates. The academic departments are examining their course requirements to improve the flow of students through the academic program. If we are unsuccessful in these efforts due to budgetary constraints, we will only improve marginally, as shown in the low estimates.

**PERFORMANCE INDICATOR TARGETS AND OTHER INSTITUTIONAL GOALS**

OREGON STATE UNIVERSITY

President Edward J. Ray

*Performance Indicators*

Outcomes assessment and accountability have become a more central and integral part of Oregon State University's ongoing self-evaluation and improvement process. Outcomes on performance indicators indicate the University's commitment to evaluating its mission and goals and its success in achieving its goals. In this context, performance indicators are used to help refine priorities, strengthen quality, and improve productivity and accountability.

The University has set realistic yet challenging improvement targets for the future. Some specific initiatives to help achieve targets include:

- Improve student retention and graduation rates: Create a new Center for Teaching and Learning and a new Academic Success Center; implement a new admissions policy; increase enrollments in the University Honors College; and sustain strong efforts in new student orientation program.
- Expand program availability and access (degree production): Review and modify academic programs through the strategic planning process; support the Engineering Top 25 Initiative; and increase the number of programs offered through Extended Campus.
- Expand external funding: Establish excellence in selected initiatives within five thematic areas; align research centers, institutes, and graduate programs with the thematic areas; increase entrepreneurship activities; and target federal, state, and private sources for research growth.
- Increase student learning and employability: Enhance excellence with regard to student learning; integrate internships, research experiences, and international experiences in the curriculum; and provide outstanding support services.
- Attract more diverse students and those with higher GPAs and SAT scores: Target high achieving students both in-state and out-of-state; implement a new admission policy; attract and retain faculty of color to serve as role models and mentors; and improve the coordination of classroom learning experiences coupled with co-curricular activities.

*Other Institutional Goals*

Through implementation of the University's new strategic plan, we are charting a course to be among the nation's top ten land-grant universities.

To achieve this vision, we are embarking on an integrated approach that will improve the quality of the graduates from our undergraduate, graduate, and professional degree programs, because it is through our graduates' impact and success that the University

## **Performance Indicator Targets and Other Institutional Goals for 2003-04**

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will make profound contributions to the future economic, social, environmental, and civic well-being of Oregon, the nation, and the world.

Our integrated approach seeks pre-eminence in five thematic areas. This will be achieved by attracting world-class faculty, students, equipment, and facilities, and by improving the teaching and learning environment. To affect our vision, we will maximize economic efficiencies and attract and strategically invest new resources from state, federal, and private sources—investments in people, place, and purpose.

# Performance Indicator Targets and Other Institutional Goals for 2003-04

## Oregon State University Performance Indicator Target Summary, 2003-04

	<i>Common to All Institutions</i>				<i>Selected by Institution</i>			
	Retention <sup>1</sup>	Total Degrees <sup>2</sup>	Shortage Degrees <sup>3</sup>	Graduate Rating <sup>4</sup>	R & D Expend <sup>5</sup>	Top OR HS Grads <sup>6</sup>	Student Diversity <sup>7</sup>	
<b>Results</b>								
1999-00		78.6	3,386	551	85.9	\$105.3	28.9	12.6
2000-01		79.5	3,304	576	82.6	\$113.3	28.9	12.8
2001-02		79.6	3,459	599	not available	\$123.2	28.3	12.8
2002-03		pending	pending	pending	pending	pending	30.5	13.1
<b>Targets</b>								
2002-03 (set 2001)	Low	81.2	3,388	548	66.6	\$106.9	29.4	12.9
	High	82.4	3,493	560	68.3	\$110.5	30.0	13.2
2003-04 (set 2001)	Low	80.0	3,800	600	70.0	\$130.0	29.7	13.0
	High	81.0	4,000	650	80.0	\$140.0	30.5	13.5
2004-05 (set 2003)	Low	80.5	3,900	650	72.0	\$135.0	30.0	13.2
	High	82.0	4,200	700	82.0	\$150.0	32.0	14.0
2007-08 (set 2003)	Low	81.0	4,000	700	75.0	\$140.0	31.0	13.6
	High	84.0	4,400	750	85.0	\$160.0	35.0	15.0
<b>Low Target to Last Results</b>								
T 04-05	Low	0.9	441	51	-10.6	\$11.8	-0.5	0.1
T 07-08	Low	1.4	541	101	-7.6	\$16.8	0.5	0.5
<b>High Target to Last Results</b>								
T 04-05	High	2.4	741	101	-0.6	\$26.8	1.5	0.9
T 07-08	High	4.4	941	151	2.4	\$36.8	4.5	1.9

**Notes:**

<sup>1</sup> Percent of first-time, full-time freshmen that return for a second year at OSU.

<sup>2</sup> Total degrees (bachelor's, master's, doctorate, and professional) awarded.

<sup>3</sup> OSU selected engineering and computer science fields.

<sup>4</sup> Percent of OSU bachelor's degree recipients rating the quality of the overall experiences as "very good" or higher on a 5-point scale (with 5 as "excellent").

<sup>5</sup> Research and development expenditures using grant funds from external sources (e.g., federal, private).

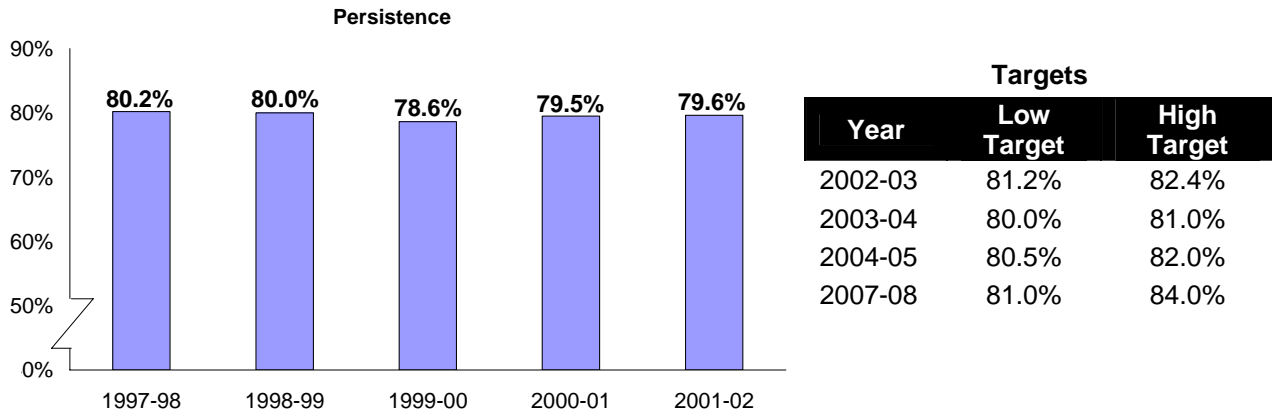
<sup>6</sup> Percent of entering Oregon freshmen at OSU with high school GPAs of 3.75 or higher.

<sup>7</sup> Enrollment of students of color in credit courses (percent of total enrollment).

## Performance Indicator Targets and Other Institutional Goals for 2003-04

### Oregon State University Performance Indicator Target Detail

**Freshman Persistence/Retention.** Full-time freshmen that return to OSU for a second year.<sup>7</sup>



#### Performance Trend:

- OSU retained fewer freshmen in the third year following their highest performance in 1997-98. The last two years show gains to stabilize retention.

#### Rationale for Future Targets:

- A campus-wide retention framework will be designed to guide current and future retention activities.
- Creation of a new Center for Teaching and Learning (to assist faculty in developing an effective learning environment), and a new Academic Success Center (a comprehensive resource for academic support services to assist students in being successful and achieving their highest potential).
- Implementing a new admissions policy that incorporates cognitive factors for predicting student success at OSU.
- Increasing enrollment in the University Honors College.

<sup>7</sup> For example, data for 2001-02 reflect the number of OSU freshmen who entered in fall 2001 and were still enrolled at OSU in fall 2002.

## Performance Indicator Targets and Other Institutional Goals for 2003-04

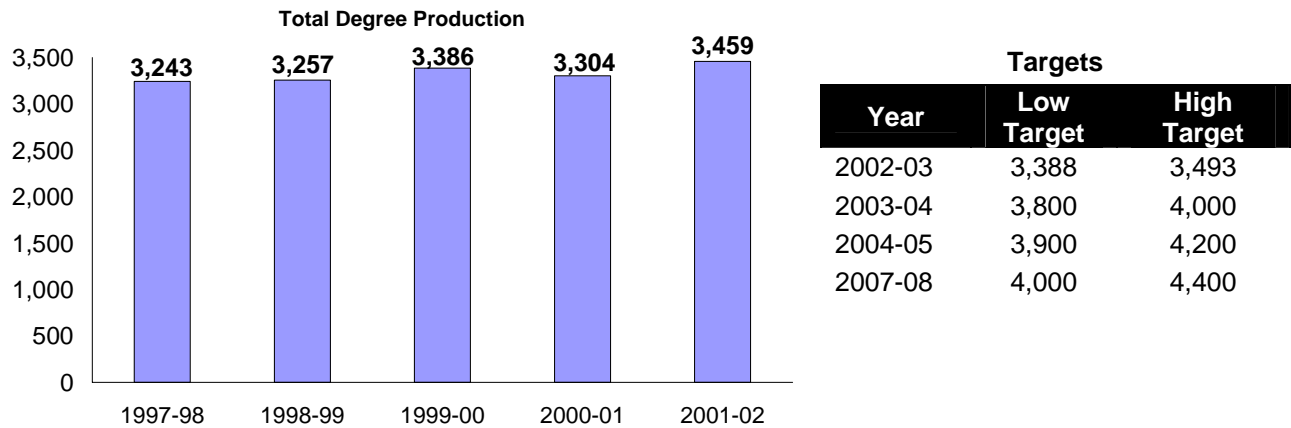
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### Oregon State University Performance Indicator Target Detail

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**Total Degree Production.** Bachelor's, master's, doctoral, and first professional degrees awarded in a given academic year.



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#### Performance Trend:

- OSU realized an absolute growth of 216 degrees from 1997-98 to 2001-02, representing a 7 percent increase in degree production.

#### Rationale for Future Targets:

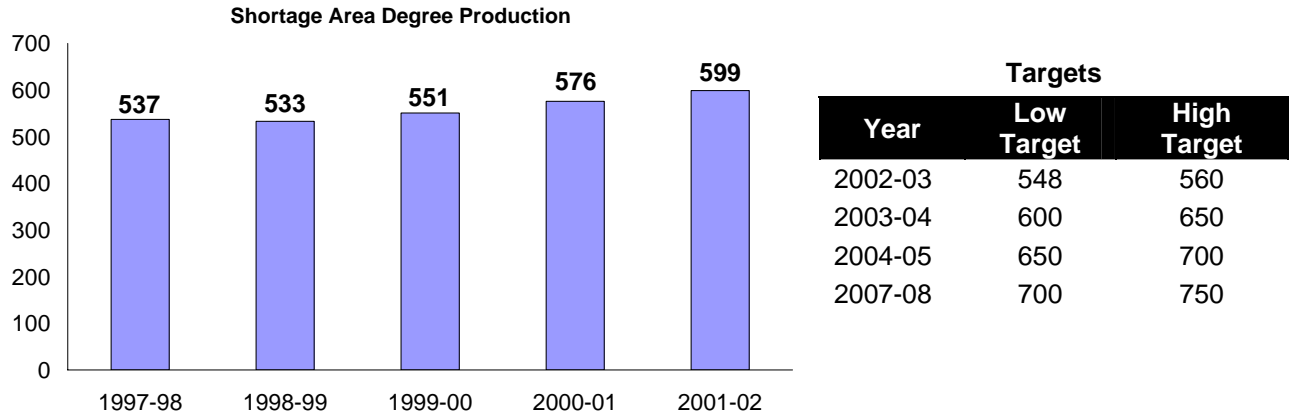
- Ensure relevancy of academic programs.
- Increase retention rates through initiatives such as the Center for Teaching and Learning and Academic Success Center.
- Offer selected programs through Extended Campus (e.g., programs specifically designed to meet the needs of local communities such as in Bend and Portland).

Oregon State University  
Performance Indicator Target Detail

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**Degree Production in Engineering and Computer Science Fields.** Number of degrees produced in this Oregon Shortage Area.



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Performance Trend:

- OSU realized an absolute growth of 62 engineering and computer information systems (CIS) degrees from 1997-98 to 2001-02, representing a 12 percent gain.

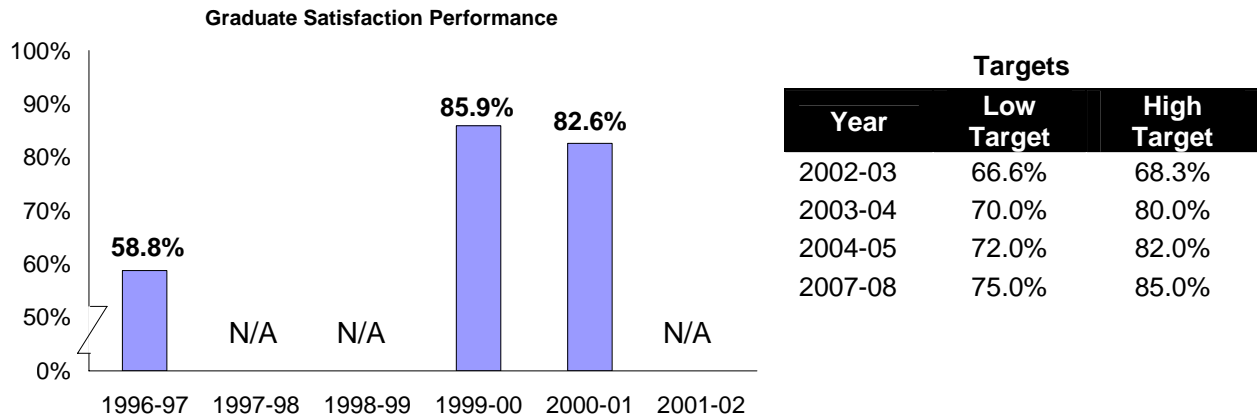
Rationale for Future Targets:

As specified and articulated in the new strategic plan, campus will continue to support OSU's Engineering and Computer Science degree programs and to invest in the Engineering Top 25 Initiative.

## Performance Indicator Targets and Other Institutional Goals for 2003-04

### Oregon State University Performance Indicator Target Detail

**Recent Graduate Satisfaction.** Recent bachelor's degree recipients were asked to rank the overall quality of their educational experience on a scale of 1 to 5 (with 1 as low and 5 as high). Scores reported include 4s and 5s combined.<sup>8</sup>



#### Performance Trend:

- The percent of recent graduates rating the overall quality of the education received at OSU as “very good” or “excellent” increased 24 percentage points between 1996-97 and 2000-01.

#### Rationale for Future Targets:

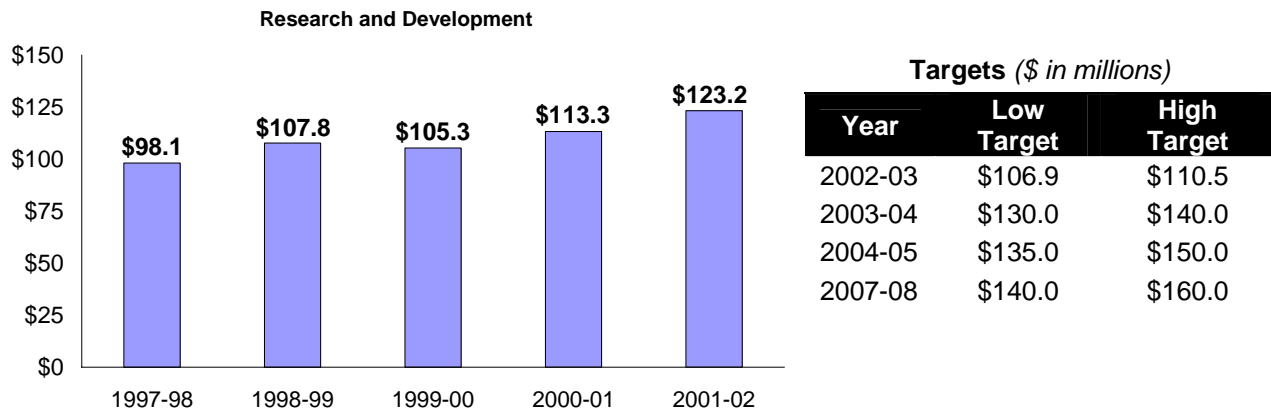
- Offer the best possible degree programs, including the integration of internship and international experiences.
- Provide outstanding support services and co-curricular activities.

<sup>8</sup> In the future, this survey will be conducted every other year by OUS Office of Planning.

## Performance Indicator Targets and Other Institutional Goals for 2003-04

### Oregon State University Performance Indicator Target Detail

**Research and Development (R&D).** Annual expenditures for research, training/teaching, and similar activities supported by grants from federal and private sources (dollars in millions).



#### Performance Trend:

- Spending on R&D, crucial to Oregon's competitiveness, increased considerably over the last five years at OSU—a 26 percent increase between 1997-98 and 2001-02.

#### Rationale for Future Targets:

- Evaluate the development of a new research park.
- Engage in pursuing the establishment—in collaboration with other universities—of new research centers.
- Increase entrepreneurship activities through centers and institutes.
- Develop a focused Portland initiative based on the strengths of OSU programs.
- Develop new initiatives in our statewide operations to address evolving economic and societal issues in Oregon.
- Target federal, state, and private initiatives and sources for research growth.

## Performance Indicator Targets and Other Institutional Goals for 2003-04

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### Mission Specific Indicators Selected by OSU Performance Indicator Target Detail

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**Higher-Achieving High School Graduates.** Newly admitted freshmen from Oregon high schools with grade point averages (GPA) of 3.75 or higher.

Year	Performance	Low Target	High Target
2000-01	28.9%		
2001-02	28.3%		
2002-03	30.5%	29.4%	30.0%
2003-04		29.7%	30.5%
2004-05		30.0%	32.0%
2007-08		31.0%	35.0%

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#### Performance Trend:

- The percentage of high achievers admitted to OSU increased in 2002-03, exceeding the high target for that year.

#### Rationale for Future Targets:

- Increase enrollment in the University Honors College.
- Acquire and invest private resources at the institution and unit levels to attract and retain high achieving students.

## Performance Indicator Targets and Other Institutional Goals for 2003-04

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### Mission Specific Indicators Selected by OSU Performance Indicator Target Detail

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**Student Diversity.** Students of color enrolled in credit courses in undergraduate or graduate programs (percent of total enrollment).

Year	Performance	Low Target	High Target
1998-99	12.0%		
1999-00	12.6%		
2000-01	12.8%		
2001-02	12.8%		
2002-03	13.1%	12.9%	13.2%
2003-04		13.0%	13.5%
2004-05		13.2%	14.0%
2007-08		13.6%	15.0%

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Performance Trend:

- The proportion of students of color enrolled at OSU has been steadily increasing.

Rationale for Future Targets:

- Attract and retain faculty of color to serve as role models and mentors.
- Enhance and integrate existing diversity activities to provide more effective recruitment and subsequent retention of students.

**PERFORMANCE INDICATOR TARGETS AND OTHER INSTITUTIONAL GOALS**  
**PORTLAND STATE UNIVERSITY**  
President Daniel O. Bernstine

Performance Indicators

PSU's mission, vision, values, strategic planning, and priority setting process align with the broader OUS goals of access, educational quality, cost-effectiveness, and employability of graduates. Taken together, PSU's efforts have made a substantial contribution to its success in meeting or exceeding its performance targets.

- The University has implemented a plan to be more intentional about its enrollment. We are working to balance the institution's dual goals of providing access and ensuring quality through strategic recruitment and retention strategies combined with institution wide assessment of student learning outcomes. Our increasing freshman retention rates are evidence of our successful efforts at the undergraduate level to recruit high achieving students and those who show potential for academic achievement through non-traditional measures.
- PSU's commitment to supporting nationally-ranked graduate programs and those consistent with the state's social and economic needs has led to the appointment of an ad hoc committee on graduate education. During 2003-04, this committee will make recommendations for institutional initiatives to support, develop, and fund graduate programs that are likely to achieve national and international recognition and contribute to the economic and social vitality of the region. In particular, graduate degree production and research expenditures in engineering and computer science continue to increase, consistent with institutional and Systemwide priorities in these areas.
- The University values its dual roles as leader in the development of knowledge and civic partner in the greater metropolitan region and beyond. The institution is actively promoting departmental planning to create coherent research agendas across campus and to encourage faculty to collaborate in federal initiatives across the region. Growth in research is providing indirect cost recovery dollars to the campus, enabling us to implement new initiatives that will lead to the generation of new knowledge and economic development opportunities.
- Student learning and community engagement are major foci of PSU's mission and vision for the future. The University's efforts in this area have been recognized nationally, most recently in *US News and World Report's* "America's Best Colleges," which has twice listed PSU's programs in service learning and learning communities as "Programs To Look For." Enrollments in Senior Capstones and community-based learning continue to grow and have consistently exceeded aggressive targets for this indicator.

## **Performance Indicator Targets and Other Institutional Goals for 2003-04**

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### *Other Institutional Goals*

PSU's strategic goals and long-range objectives are focused on student learning, innovative research, community engagement, and fiscal responsibility. Key among these are:

- Reorganization of Extended Studies to create enhanced institutional revenue.
- Greater focus on residential students and the relationship between academic goals and co-curricular research.
- Developing PSU's research and creative capacity consistent with our central role in knowledge creation and community engagement.

## Performance Indicator Targets and Other Institutional Goals for 2003-04

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### Portland State University Performance Indicator Target Summary, 2003-04

	<i>Common to All Institutions</i>				<i>Selected by Institution</i>			
	Retention <sup>1</sup>	Total Degrees <sup>2</sup>	Shortage Degrees <sup>3</sup>	Graduate Rating <sup>4</sup>	R & D Expend <sup>5</sup>	Federal R & D <sup>6</sup>	Community-service Learning <sup>7</sup>	
<b>Results</b>								
1999-00	65.2	3,271	264	69.9	\$24.0	\$6.4	5,934	
2000-01	68.5	3,431	231	66.5	\$26.4	\$8.5	7,518	
2001-02	67.9	3,488	268	not available	\$25.9	\$7.5	6,918	
2002-03	Pending	pending	pending	pending	pending	\$8.4	7,432	
<b>Targets</b>								
	High	65.8	3,261	286	63.7	\$23.8	\$6.8	6,816
2002-03 (set 2001)	Low	64.8	3,234	279	63.1	\$22.9	\$6.7	6,871
	High	67.2	3,324	298	64.9	\$25.4	\$6.8	7,036
2003-04 (set 2001)	Low	65.4	3,267	284	63.7	\$23.6	\$6.9	7,036
	High	68.6	3,387	310	66.1	\$26.9	\$7.0	7,256
2004-05 (set 2003)	Low	66.1	3,850	290	64.3	\$32.0	\$8.9	7,808
	High	70.0	4,150	322	67.3	\$33.5	\$9.5	8,194
2007-08 (set 2003)	Low	71.4	4,225	308	70.7	\$38.1	\$9.7	8,409
	High	76.0	4,525	358	77.9	\$41.2	\$11.0	9,485
<b>Low Target to Last Results</b>								
T 04-05	Low	-1.8	362	22	-2.2	\$6.1	0.5	376
T 07-08	Low	3.5	737	40	4.2	\$12.2	1.3	977
<b>High Target to Last Results</b>								
T 04-05	High	2.1	662	54	0.8	\$7.6	1.1	762
T 07-08	High	8.1	1,037	90	11.4	\$15.3	2.6	2,053

**Notes:**

<sup>1</sup> Percent of first-time, full-time freshmen who return for a second year at PSU.

<sup>2</sup> Total degrees (bachelor's, master's, and doctorate) awarded.

<sup>3</sup> PSU selected engineering and computer science fields.

<sup>4</sup> Percent of PSU bachelor's degree recipients rating the quality of the overall experiences as "very good" or higher on a 5-point scale (with 5 as "excellent").

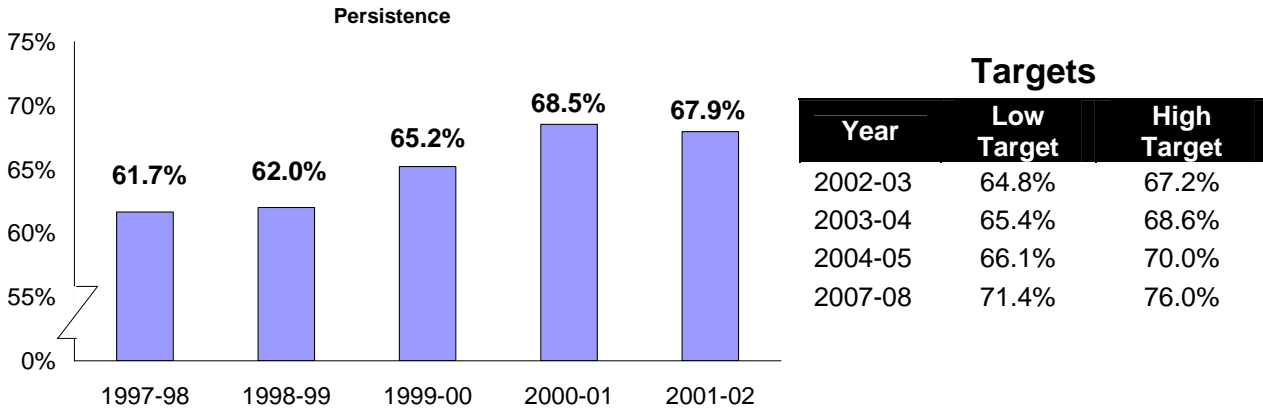
<sup>5</sup> Research and development expenditures using grant funds from external sources (e.g., federal, private).

<sup>6</sup> R&D expenditures at PSU supported with federal resources.

<sup>7</sup> Number of students who enrolled in a community-service learning project.

Portland State University  
Performance Indicator Target Detail

**Freshman Persistence/Retention.** Full-time freshmen that return to PSU for a second year.<sup>9</sup>



Performance Trend:

- PSU gained over six percentage points in the freshmen retained between 1997-98 and 2001-02.

Rationale for Future Targets:

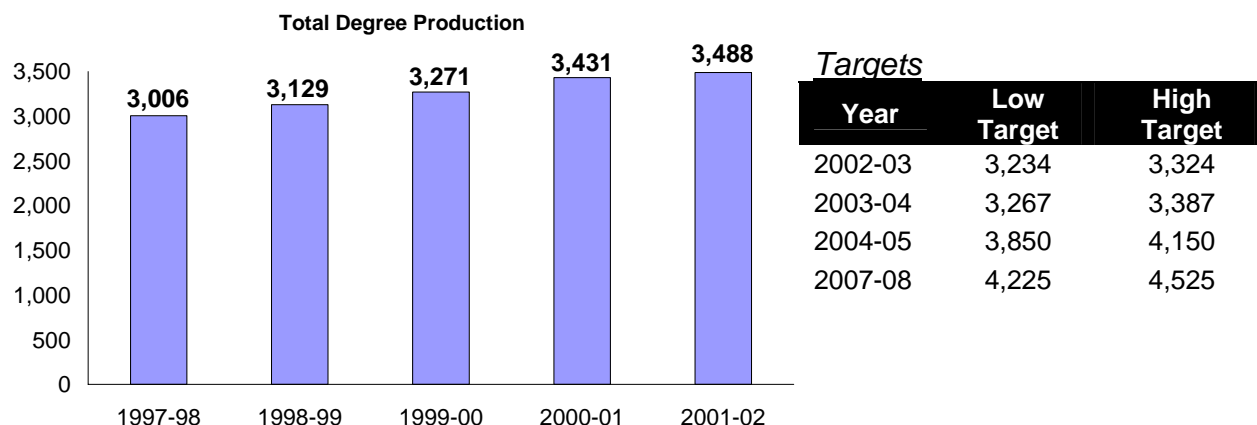
PSU’s planning priorities include our commitment to attract and retain a student body that is excellent and diverse. As part of this, we have implemented a plan to recruit and retain high achieving students and those who show potential for academic achievement through non-traditional measures of performance. By retaining freshmen at or above the average of our peers, we will ensure student success and continuity in the educational careers of a larger number of students. We have met or exceeded our targets for this indicator over the past five reporting years.

<sup>9</sup> For example, data for 2001-02 reflect the number of PSU freshmen who entered in fall 2001 and were still enrolled at PSU in fall 2002.

## Performance Indicator Targets and Other Institutional Goals for 2003-04

### Portland State University Performance Indicator Target Detail

**Total Degree Production.** Bachelor's, master's, and doctoral degrees awarded in a given academic year.



#### Performance Trend:

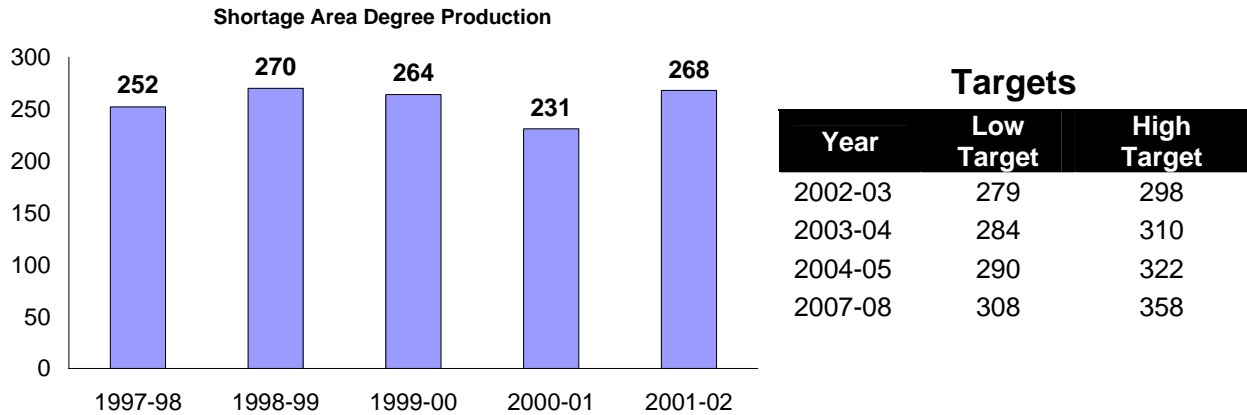
- PSU saw an absolute growth of 482 degrees between 1997-98 and 2001-02, representing a 16 percent increase in degree production.

#### Rationale for Future Targets:

- Targets for 2004-05 and 2007-08 have been revised because the University's performance on this indicator had continually exceeded the earlier targets.
- Increased retention and graduation rates at the undergraduate level, high demand for degrees at the graduate level, and burgeoning enrollments are expected to contribute to increased degree production across the institution. PSU continues to be an institution of choice for both resident and non-resident students who are attracted to its high quality programs, emphasis on community engagement, and opportunities for research at the undergraduate and graduate levels.

Portland State University  
Performance Indicator Target Detail

**Degree Production in Engineering and Computer Science Fields** Number of degrees produced in this Oregon Shortage Area.



*Performance Trend:*

PSU saw an absolute growth of 16 degrees between 1997-98 and 2001-02, representing a 6 percent increase in degree production.

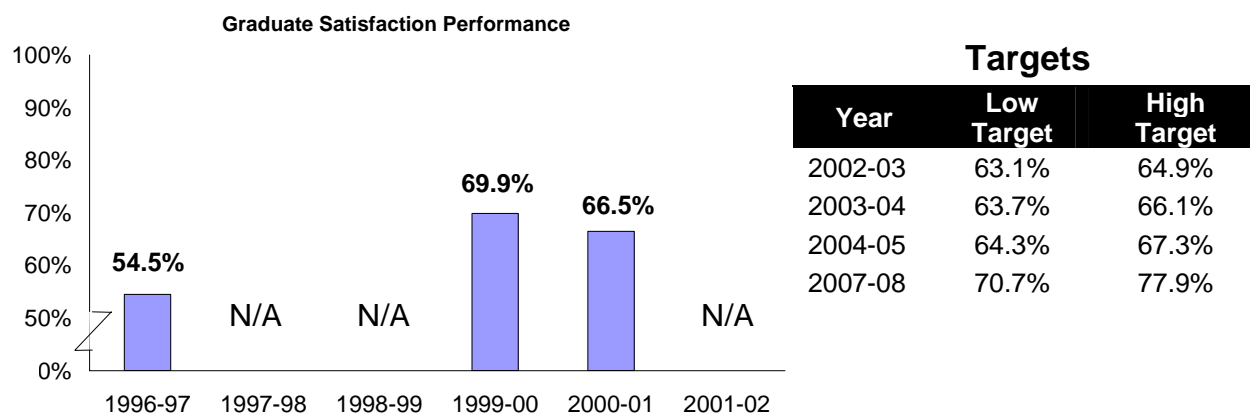
*Rationale for Future Targets:*

Declines in the high-tech industry in recent years contributed to smaller entering cohorts in some engineering disciplines. Although this circumstance led to performance below projected targets, improvement has begun and is anticipated to continue. Enrollment in engineering graduate programs is growing dramatically and is matched by increases in degree production at the master's and doctoral levels. Although data are not yet available, we expect to see growth in degrees granted overall, in engineering and computer science specifically, and in alumni satisfaction with the university. PSU's priorities include providing degree programs that contribute to the economic vitality of the region; engineering and computer science play a significant role in this priority area.

## Performance Indicator Targets and Other Institutional Goals for 2003-04

### Portland State University Performance Indicator Target Detail

**Recent Graduate Satisfaction.** Recent bachelor's degree recipients were asked to rank the overall quality of their educational experience on a scale of 1 to 5 (with 1 as low and 5 as high). Scores reported include 4s and 5s combined.<sup>10</sup>



#### Performance Trend:

- The proportion of students rating the overall quality of the education received at PSU “very good” or “excellent” increased 12 percentage points from 1996-97 to 2000-01.

#### Rationale for Future Targets:

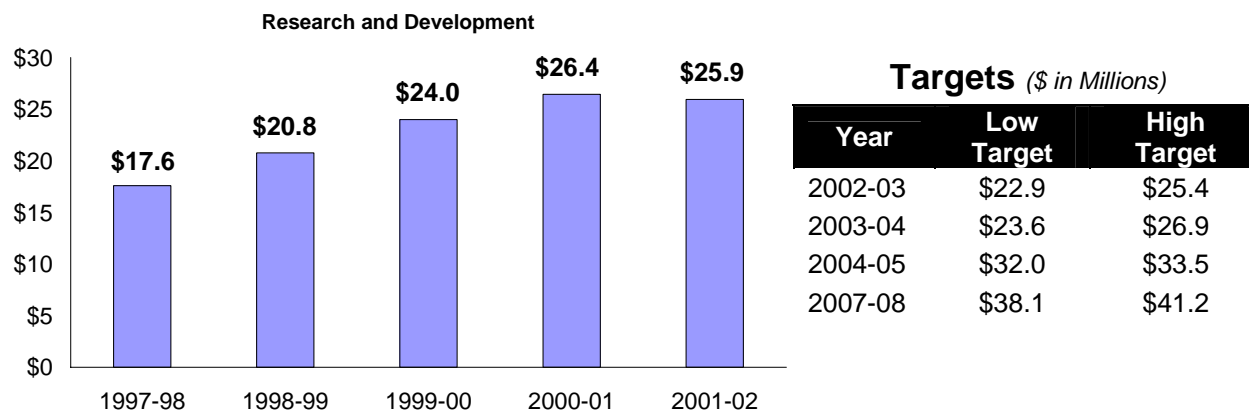
PSU seeks to provide an undergraduate educational experience that emphasizes access for diverse populations, opportunities for academic achievement, and co-curricular activities that enhance learning. In recent years, we have exceeded our target for this indicator and expect our progress to continue. We have implemented plans to increase student housing and residential life programs, along with activities to support students of color and other underrepresented groups, that will lead to enhanced satisfaction among undergraduates.

<sup>10</sup> In the future, this survey will be conducted every other year by OUS Office of Planning.

## Performance Indicator Targets and Other Institutional Goals for 2003-04

### Portland State University Performance Indicator Target Detail

**Research and Development (R&D)** Annual expenditures for research, training/teaching, and similar activities supported by grants from federal and private sources (dollars in millions).



#### Performance Trend:

- Spending on R&D increased steadily over the last five years at PSU—an 8 percent increase in 2001-02 compared to 1997-98.

#### Rationale for Future Targets:

PSU's efforts to increase research and development are consistent with its institutional priorities, as well as System goals. PSU is actively encouraging departmental planning to create coherent research agendas across campus. Through this process, we are seeking to balance increased enrollment growth with increased research opportunities for faculty and students. Our activities in the area of technology transfer have grown dramatically in recent years in keeping with our institutional mission to provide programs and research that enhance the economic vitality of the region. PSU has exceeded its targets on this indicator over the past five years and expects continued progress as it implements plans for enhancing faculty research opportunities.

## Performance Indicator Targets and Other Institutional Goals for 2003-04

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### Mission Specific Indicators Selected by PSU Performance Indicator Target Detail

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#### R&D Expenditures Supported with Federal Resources. (*Dollars in millions*)

Year	Performance	Low Target	High Target
2000-01	\$8.5		
2001-02	\$7.5		
2002-03	\$8.4	\$6.7	\$6.8
2003-04		\$6.9	\$7.0
2004-05		\$8.9	\$9.5
2007-08		\$9.7	\$11.0

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#### Performance Trend:

- PSU's performance has held steady after a large increase in two prior years.

#### Rationale for Future Targets:

- This target had been revised to reflect the fact that PSU's expected performance is more likely to be between the sustained and accelerated targets in 2004-05 and 2007-08.
- PSU has begun implementation of a plan to enhance research expenditures across the institution. Increases in earlier years, on which targets have been based, are not represented on this table. Recently, the expiration of several large federal grants has caused PSU's numerical performance on this indicator to appear flat; however, replacement of these grants is well underway. Our targets for future years reflect increases we expect to see as a result of our initiatives. Also, because, federal pass-through dollars are not represented in the targets for this indicator, PSU's performance is understated by \$9.0 million. The University's research agenda actively encourages faculty to collaborate in federal initiatives across the region. In addition to providing increased research opportunities for faculty and students, an enhanced research agenda will lead to creation of new knowledge, contributions to the economic vitality of the region, and increased revenues to support academic programs.

### Mission Specific Indicators Selected by PSU Performance Indicator Target Detail

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**Community-service learning.** Number of students who enrolled in a community-service learning project designed to develop higher-order thinking skills and competencies needed in the workplace and contribute to the Portland community.

Year	Performance	Low Target	High Target
2000-01	7,518		
2001-02	6,918		
2002-03	7,432	6,871	7,036
2003-04		7,036	7,256
2004-05		7,808	8,194
2007-08		8,409	9,485

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#### Performance Trend:

- The enrollment in community-based learning (capstones) increased in prior years and is now steady.

#### Rationale for Future Targets:

- This target has been revised to reflect the fact that PSU's expected performance is more likely to fall between the sustained and accelerated targets for in 2004-05 and 2007-08.
- PSU's undergraduate general education program includes a community-based learning component (Capstone) that is in alignment with the institution's vision and values as a university that is engaged with its community. All undergraduate students are expected to complete a Capstone or community-based learning component by the time they graduate. The University sees this as a vital part of the educational experience for all students. This experience helps to prepare graduates who can make a direct contribution to the economic vitality of the region and the communities in which they live. The University saw substantial growth in the number of students enrolled in these courses prior to 2000-01, the first year included on the chart above. PSU continues to exceed its own expectations in this area and expects to see another substantial increase in community-based learning enrollment in the next two years as additional courses are redesigned or developed to increase capacity to meet student demand.

**PERFORMANCE INDICATOR TARGETS AND OTHER INSTITUTIONAL GOALS**  
SOUTHERN OREGON UNIVERSITY  
President Elisabeth Zinser

*Performance Indicators*

*SOU Puts Student Learning First: Inside and Outside the Classroom*

- The six-year completion rate at SOU has improved from about 25 percent to an expected 34.5 to 35 percent in the past five years. We also serve a vital role in providing a quality general education experience for those who transfer to other institutions to pursue majors not offered at SOU. About 10 percent of each cohort transfer and receive degrees elsewhere in OUS.
- Persistence to the sophomore year should reach 70 percent, or perhaps 75 percent, depending upon continuous improvements in the freshman experience, adaptations in majors over time, and adequacy of resources. A new Honors Program and other new initiatives will help.
- Satisfaction of SOU graduates is quite high. It may soften with rising tuition and reduced funding. In spite of reduced frequency in courses offerings, larger classes, and curtailments in services, the strong dedication of faculty and staff will help to sustain satisfaction.
- Degrees awarded is a result of both freshman retention/completion and transfer activity. We aim to increase graduation rates for all students—including full-time/first-time freshmen continuing to graduation, transfer students seeking a degree from SOU, and students pursuing a degree on a part-time basis.

*Meeting regional responsibilities includes providing “degrees in shortage areas”*

- Degrees awarded in computer science grew quickly when resources through ETIC were channeled to SOU. Demand is high. Reductions in funding and pressures on the “high tech” industry have caused reductions in enrollments. SOU has been aggressive, creative, and successful in garnering support through ETIC and private sources.
- Another shortage area of deep concern to our region and university is nursing. Working with OHSU and local hospitals we aim to create strategies to expand enrollments and degrees awarded in this field. Demand is very high among our undergraduates.

*Employer satisfaction is quite high for Southern*

- Progress as a public liberal arts university with strong practical application and research experiences for undergraduates makes the difference.
- Satisfaction grew from 85 percent in 1997 to 95 percent in 2000. We aim to sustain this level.

*Gifts, grants, and contracts will grow as we continue to diversify our funding sources*

- Our goal is to raise \$30 million in gifts and expectancies (i.e., bequests) over five years with \$3 million in *SOU Fund*, \$12 million in capital projects (library, theatre, science), and \$15 million to Endowment.
- Grants and contract activity and awards have grown in the last two years. Due to budget cuts, we have taken a reduction of staffing in this area. Despite this

## Performance Indicator Targets and Other Institutional Goals for 2003-04

reduction, we intend to sustain growth in the number of submissions, rate of acceptance, and size of award.

- Because Southern focuses on teaching and learning excellence, many grants fall in this area. Moreover, SOU's regional responsiveness yields contracts for service to agencies and businesses while providing learning activities for students in research and service.

*Philanthropy is measured in various ways, including net assets*

- Growth in SOU Foundation assets will vacillate with the economy and property holdings.
- Gifts to the Endowment last year increased by nearly a half million dollars.
- The University Advancement area has been upgraded substantially with an increased investment in staff and strategic reorganization geared toward increasing philanthropic support by at least 30 percent in the next five years.

Southern is a contemporary public liberal arts and sciences university. It provides access to opportunities for personal, intellectual, and professional growth through quality education and scholarship. The University is a vital partner in the healthy development of its region and state in association with civic, national, and international engagements. It is Oregon's Center of Excellence in the Fine and Performing Arts.

### Other Institutional Goals

#### I. University Distinctiveness

- a. Develop our unique niche in practical liberal learning and its scholarship in the arts, sciences, and professions.
- b. Grow with our rising reputation as a leading public liberal arts and sciences university and expand our offerings outside of Ashland.
- c. Forge partnerships that best achieve our vision and seize opportunities that benefit the region and state.
- d. Encourage more visible engagements with compelling civic and economic challenges to enhance learning, scholarship, and service.
- e. Improve the flow and flare of communications about the University's distinctiveness, special strengths, and diverse stakeholders.

#### II. Student Learning

- a. Synthesize liberal learning, professional practice, and civic responsibility in the classroom and other inclusive learning communities.
- b. Focus graduate education on contemporary societal needs and regional strengths for liberal learning, practice, and scholarship.
- c. Align continuing professional education and lifelong learning programs to suit learners' needs and achieve cost-effective practices.
- d. Advance clear ideals regarding the value of diversity in twenty-first-century liberal education, employability, and a just society.

## **Performance Indicator Targets and Other Institutional Goals for 2003-04**

### **III. Organizational Vitality**

- a. Align priorities, expectations, and capacities with the forward direction of our university and its greatest strengths and promise.
- b. Improve decision making by better linking institutional research, planning, and budgeting at all levels.
- c. Diversify fund sources and create more organizational flexibility to accelerate momentum toward our vision.
- d. Create opportunities for faculty and staff to achieve expectations and rewards as they contribute to SOU's mission and distinctiveness.
- e. Strengthen our human, physical, and technological infrastructure, focusing on Ashland and Medford.
- f. Build the University's capacity for greater autonomy, consistent with evolving OUS Board policy and strategic planning.
- g. Enhance internal communications to nurture an informed, engaged, stimulated, and cohesive University community.

## Performance Indicator Targets and Other Institutional Goals for 2003-04

### Southern Oregon University Performance Indicator Target Summary, 2003-04

		<i>Common to All Institutions</i>				<i>Selected by Institution</i>			
		Retention <sup>1</sup>	Total Degrees <sup>2</sup>	Shortage Degrees <sup>3</sup>	Graduate Rating <sup>4</sup>	R & D Expend <sup>5</sup>	Employer Satisfaction <sup>6</sup>	Philanthropy <sup>7</sup>	
<b>Results</b>									
1999-00		68.2	967	44	81.1	\$2.6	not required <sup>8</sup>	\$13.5	
2000-01		68.4	1,008	59	79.7	\$3.2	66.9	\$14.2	
2001-02		68.8	1,030	56	not available	\$4.0	every 2 years	\$13.1	
2002-03		pending	pending	pending	pending	pending	pending	pending	
<b>Targets</b>									
2002-03 (set 2001)		Low	65.2	882	48	71.8	\$2.4	90.0	\$15.2
		High	65.8	906	54	73.5	\$2.5	95.0	\$16.7
2003-04 (set 2001)		Low	65.6	891	49	72.6	\$2.4	every 2 years	\$16.0
		High	66.4	923	57	75.3	\$2.6	every 2 years	\$18.4
2004-05 (set 2003)		Low	69.0	980	35	78.3	\$4.0	90.0	\$13.6
		High	70.8	1,000	40	80.0	\$5.0	95.0	\$14.5
2007-08 (set 2003)		Low	69.3	997	40	79.6	\$5.0	90.0	\$14.5
		High	73.8	1,100	70	82.0	\$10.0	95.0	\$17.0
<b>Low Target to Last Results</b>									
T 04-05		Low	0.2	-50	-21	-1.4	\$0.0	23.1	\$0.5
T 07-08		Low	0.5	-33	-16	-0.1	\$1.0	23.1	\$1.4
<b>High Target to Last Results</b>									
T 04-05		High	2.0	-30.0	-16	0.3	\$1.0	28.1	\$1.4
T 07-08		High	5.0	70.0	14	2.3	\$6.0	28.1	\$3.9

**Notes:**

<sup>1</sup> Percent of first-time, full-time freshmen who return for a second year at SOU.

<sup>2</sup> Total degrees (bachelor's and master's) awarded.

<sup>3</sup> SOU selected computer science majors.

<sup>4</sup> Percent of SOU bachelor's degree recipients rating the quality of the overall experiences as "very good" or higher on a 5-point scale (with 5 as "excellent").

<sup>5</sup> Research and development expenditures using grant funds from external sources (e.g., federal, private).

<sup>6</sup> Proportion of employers that rate SOU graduates as meeting or exceeding expectations in knowledge and skills.

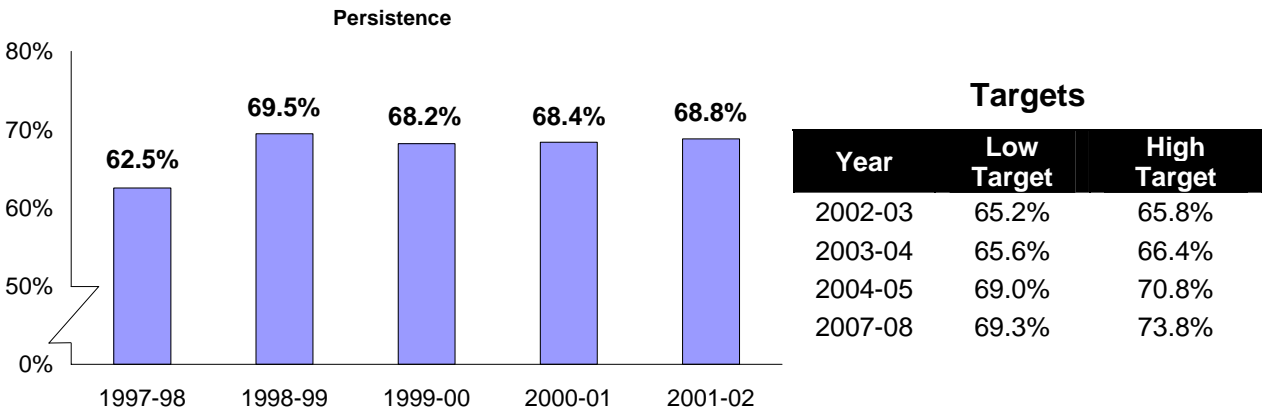
<sup>7</sup> Net assets of each foundation plus the value of obligation to the university as reported in the audited financial statements.

<sup>8</sup> Mission-specific indicator introduced in 2001, data and targets are optional .

## Performance Indicator Targets and Other Institutional Goals for 2003-04

### Southern Oregon University Performance Indicator Target Detail

**Freshman Persistence/Retention.** Full-time freshmen that return to SOU for a second year.<sup>11</sup>



#### Performance Trend:

- SOU retained six percentage points more freshmen in 2001-02 compared to 1997-98.
- This growth is largely explained by a change in how student support services are provided, gathering these functions into a “one stop” service area for student convenience and effectiveness.

#### Rationale for Future Targets:

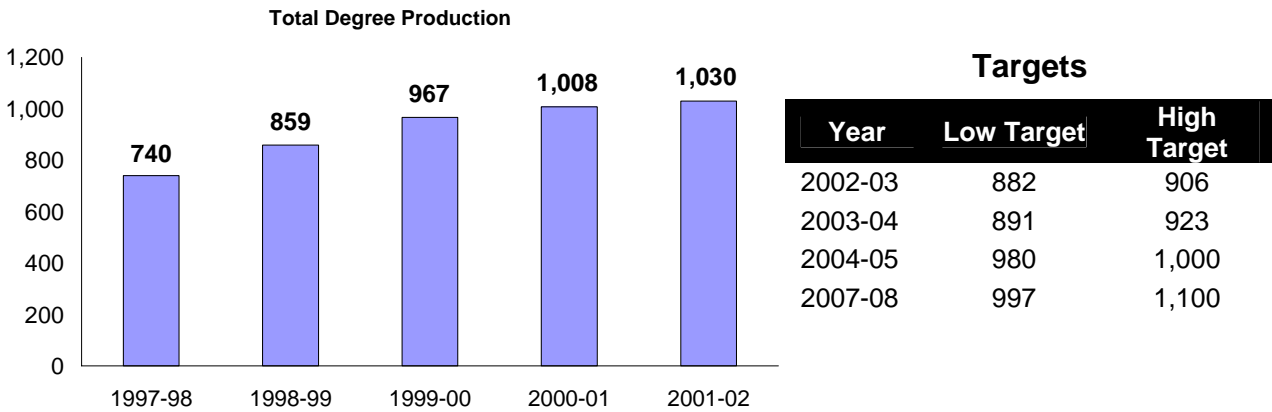
While first-time, full-time freshman enrollment is up this fall, the impact of rising tuition is uncertain at this time. A conservative estimate is appropriate. New initiatives to strengthen support for both under-prepared and honors-level students are showing positive results, but resources to extend these programs are limited.

<sup>11</sup> For example, data for 2001-02 reflect the number of SOU freshmen who entered in fall 2001 and were still enrolled at SOU in fall 2002.

## Performance Indicator Targets and Other Institutional Goals for 2003-04

### Southern Oregon University Performance Indicator Target Detail

**Total Degree Production.** Bachelor's and master's degrees awarded in a given academic year.



**Performance Trend:**

- SOU awarded 290 more degrees in 2001-02 compared to 1997-98, representing a 39 percent increase.

**Rationale for Future Targets:**

SOU enrollment remained relatively stable during the last two biennia, while the dynamics of students transferring in and out of SOU have caused modest ups and downs in alternating years. Numbers graduating may increase modestly as six-year graduation rates increase and as numbers of transfer students grow.

## Performance Indicator Targets and Other Institutional Goals for 2003-04

### Southern Oregon University Performance Indicator Target Detail

**Degree Production in Computer Sciences Fields.** Number of degrees produced in this Oregon Shortage Area.



Performance Trend:

- SOU increased the absolute growth of computer science degrees by 22 in 2001-02 compared to 1997-98, representing a gain of 65 percent.

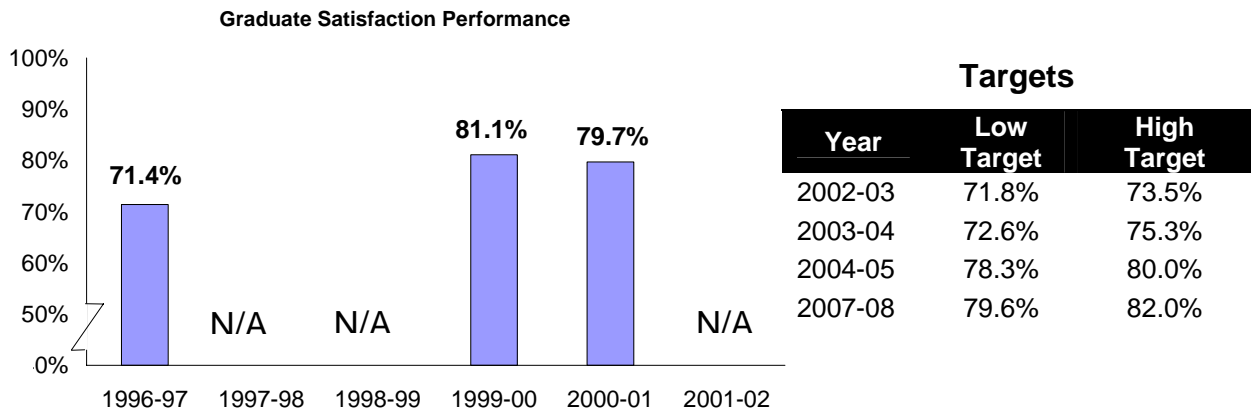
Rationale for Future Targets:

New program initiatives to increase degrees in shortage areas have been slowed by decreased funding. Focused recruiting and new tracts in the computer science program will increase the numbers of graduates. Computer and information science is the only high-tech degree area offered at SOU.

## Performance Indicator Targets and Other Institutional Goals for 2003-04

### Southern Oregon University Performance Indicator Target Detail

**Recent Graduate Satisfaction.** Recent bachelor's degree recipients were asked to rank the overall quality of their educational experience on a scale of 1 to 5 (with 1 as low and 5 as high). Scores reported include 4s and 5s combined.<sup>12</sup>



#### Performance Trend:

- The rating of the overall quality of education received at SOU is improving, with recent ratings reflecting an increase of eight to ten percentage points for graduates rating the experience "very good" or "excellent."

#### Rationale for Future Targets:

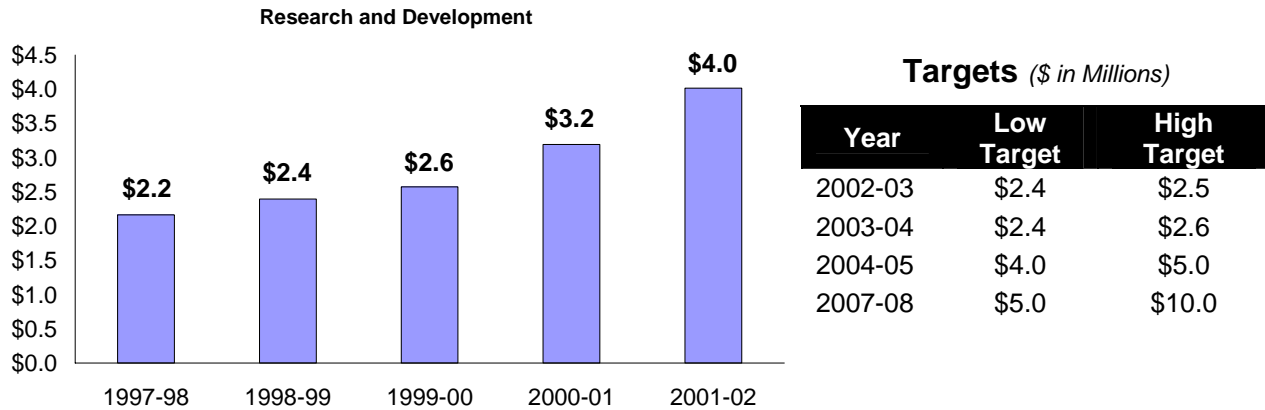
Expect less satisfaction due to impact of budget reductions on class availability, library hours, etc. Current results compare well with the OUS average. On the other hand, attention to quality is ongoing and service improvement initiatives should help counteract the negative impact of the budget reductions.

<sup>12</sup> In the future, this survey will be conducted every other year by OUS Office of Planning.

## Performance Indicator Targets and Other Institutional Goals for 2003-04

### Southern Oregon University Performance Indicator Target Detail

**Research and Development (R&D).** Annual expenditures for research, training/teaching, and similar activities supported by grants from federal and private sources (dollars in millions).



#### Performance Trend:

- SOU has seen a steady increase in R&D expenditures, representing an 82 percent increase between 1997-98 and 2001-02. The small amount of research funding compared to the research universities creates a big percentage change, with absolute growth representing \$1.8 million.

#### Rationale for Future Targets:

While SOU has been forced to reduce staff support for grant-writing, new approaches continue to engage more faculty and administrators in writing proposals. They are gaining expertise, which is leading to more awards, and larger awards. Reorganization of institutional advancement, hiring of experienced professionals, and a more sophisticated approach to the SOU Annual Fund are having a positive impact on private fundraising.

## Performance Indicator Targets and Other Institutional Goals for 2003-04

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### Mission Specific Indicators Selected by SOU Performance Indicator Target Detail

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**Employer Satisfaction with Bachelor's Graduates** The proportion of employers that rate SOU graduates as meeting or exceeding expectations in knowledge and skills (survey conducted every two years) .

Year	Performance	Low Target	High Target
1997-98	25.4% <sup>13</sup>		
1998-99	N/A		
1999-00	N/A		
2000-01	66.9%		
2001-02	N/A		
2002-03	Pending	90.0%	95.0%
2003-04		N/A	N/A
2004-05		90.0%	95.0%
2007-08		90.0%	95.0%

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#### Performance Trend:

- Trend analysis is impossible due to different scales used during the 1997-98 and 2000-01 surveys.

#### Rationale for Future Targets:

The percentage of ratings at average and above was 85 percent in 1997 and 95 percent in 2000. We continue to work with employers to design educational programs that address industry and corporation needs where feasible, but targeted initiatives are limited by the diversity of employment opportunities. Hands on experiences and internships contribute to strong employer satisfaction, just as do the graduates' basic knowledge and skills from a sound liberal education mixed with relevant preparation in the major. Continued effectiveness is a reasonable objective in spite of potential negative impacts following from changes occasioned by budget cuts.

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<sup>13</sup> The 1997 survey employed a 4-point scale making trend analysis with the 2000 5-point scale impossible.

## Performance Indicator Targets and Other Institutional Goals for 2003-04

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### Mission Specific Indicators Selected by SOU Performance Indicator Target Detail

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#### Philanthropic Support (*\$ in millions*)

Year	Performance	Low Target	High Target
1997-98	\$14.0		
1998-99	\$16.6		
1999-00	\$13.5		
2000-01	\$14.2		
2001-02	\$13.1	\$14.5	\$15.2
2002-03		\$15.2	\$16.7
2003-04		\$16.0	\$18.4
2004-05		\$13.6	\$14.5
2007-08		\$14.5	\$17.0

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#### Performance Trend:

- Philanthropic support declined \$1 million, or 7.7 percent between 2000-01 and 2001-02.

#### Rationale for Future Targets:

Targets assume slow economic recovery and growth in market returns on investment portfolios. Improved strategies, staffing, and plans for private fund raising will lead to some growth in endowment assets in current dollars and expectancies.

**PERFORMANCE INDICATOR TARGETS AND OTHER INSTITUTIONAL GOALS**

UNIVERSITY OF OREGON

President Dave Frohnmayer

*Performance Indicators*

1. Freshman persistence/retention
  - Significant improvement in past five years; 83 percent retention in FY 2001-02; economic situation may damage ability to improve.
  - Will continue with special programs for freshmen; need to increase strategic use of financial aid; scholarships are focus of capital campaign.
2. Total Degree Production
  - Have not achieved consistent growth in degree production and will likely level off at 3,750.
  - Must limit entering class to manage within budget constraints.
3. Licenses Produced in K-12 Administration
  - Exceeded 2001-02 high target in 1999; demand is strong.
  - Will accommodate as possible within resources available.
4. Recent Graduate Satisfaction
  - Exceeded high targets by offering highest quality educational experiences, services to students.
  - Increased professional school minors, career services, participatory learning experiences, internships.
  - Adding new housing option, a Living Learning Center, to enhance student satisfaction.
5. Research and Development
  - Exceeded targets by more than 20 percent in 2001-02; growth likely to slow to 5 percent per year given federal budget issues, the decrease in state support for research, and the limits to increasing faculty size.
  - Major goal of fund-raising campaign is endowed chairs to attract highly productive faculty.
6. Competitive Faculty Compensation
  - Faculty compensation declining relative to our peers; support for faculty is major goal of fund-raising campaign, but cannot rely on private support alone to solve problem.
7. Research and Economic Development Index
  - Only have data available for two years; results are twice forecasted targets for 2001-02; expect 10 percent growth rate per year.
  - Increase of 35 percent in competitively awarded grants, contracts since FY 2000-01; doubled technology transfer-related licenses between FY 2002-03.

## **Performance Indicator Targets and Other Institutional Goals for 2003-04**

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### *Other Institutional Goals*

1. Improve our standing on various benchmarks within the Association of American Universities.
2. Provide more lower-cost tuition alternatives.
3. Launch the public phase of our fund-raising campaign.
4. Increase the diversity of our student body and the involvement of student, faculty, and administration in various international programs.
5. Seek targeted state funding for established research strengths in areas critical to the knowledge economy.

## Performance Indicator Targets and Other Institutional Goals for 2003-04

### University of Oregon Performance Indicator Target Summary, 2003-04

	<i>Common to All Institutions</i>				<i>Selected by Institution</i>			
	Retention <sup>1</sup>	Total Degrees <sup>2</sup>	Shortage Degrees <sup>3</sup>	Graduate Rating <sup>4</sup>	R & D Expend <sup>5</sup>	Faculty Compensation <sup>6</sup>	Research and Economic Development Index <sup>7</sup>	
<b>Results</b>								
1999-00	80.8	4,219	61	79.5	\$56.4	not available	2.9	
2000-01	81.5	3,985	84	74.8	\$59.4	85.7	4.4	
2001-02	83.0	4,010	79	not available	\$67.4	83.8	4.6	
2002-03	pending	pending	pending	pending	pending	pending	pending	
<b>Targets</b>								
2002-03 (set 2001)	Low	82.4	4,264	56	66.6	\$54.9	91.0	2.8
	High	83.0	4,384	61	68.3	\$56.6	92.5	3.0
2003-04 (set 2001)	Low	83.2	4,307	64	67.4	\$56.1	93.0	3.1
	High	84.0	4,467	70	69.9	\$58.3	95.0	3.2
2004-05 (set 2003)	Low	83.0	3,750	72	75.0	\$80.0	83.8	5.5
	High	84.0	3,900	80	77.0	\$82.0	85.0	5.7
2007-08 (set 2003)	Low	83.0	3,750	80	75.0	\$92.0	83.8	7.3
	High	84.0	3,900	90	77.0	\$94.0	85.0	7.5
<b>Low Target to Last Results</b>								
T 04-05	Low	0.0	-260	-7	0.2	\$12.6	0.0	0.9
T 07-08	Low	0.0	-260	1	0.2	\$24.6	0.0	2.7
<b>High Target to Last Results</b>								
T 04-05	High	1.0	-110	1	2.2	\$14.6	\$1.2	1.1
T 07-08	High	1.0	-110	11	2.2	\$26.6	\$1.2	2.9

**Notes:**

<sup>1</sup> Percent of first-time, full-time freshmen who return for a second year at UO.

<sup>2</sup> Total degrees (bachelor's, master's, doctorate, and professional) awarded.

<sup>3</sup> UO selected K-12 endorsements in administration.

<sup>4</sup> Percent of UO bachelor's degree recipients rating the quality of the overall experiences as "very good" or higher on a 5-point scale (with 5 as "excellent").

<sup>5</sup> Research and development expenditures using grant funds from external sources (e.g., federal, private).

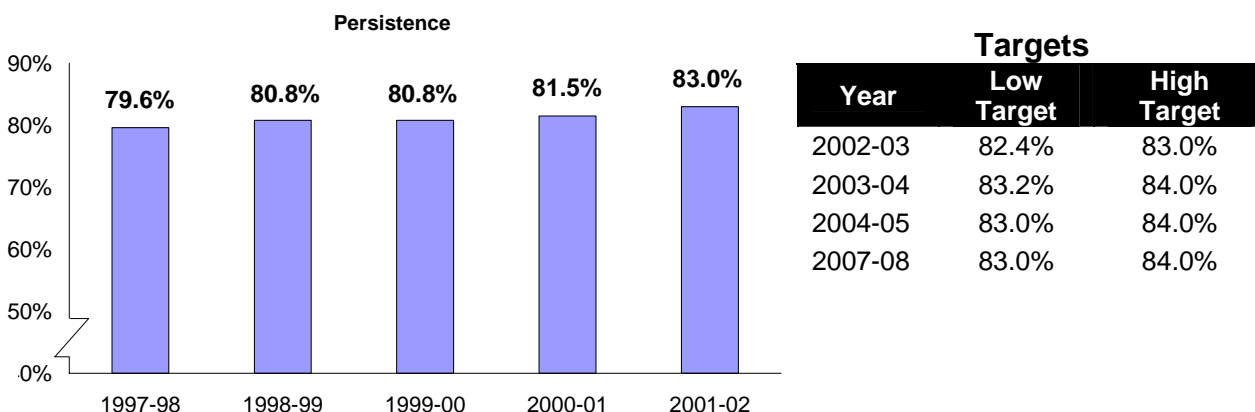
<sup>6</sup> Average compensation of UO faculty as percent of average faculty compensation at UO's peer institutions.

<sup>7</sup> Ratio of industrial support for R&D, income from tech transfer, and jobs supported by R&D compared to peer average.

## Performance Indicator Targets and Other Institutional Goals for 2003-04

### University of Oregon Performance Indicator Target Detail

**Freshman Persistence/Retention.** Full-time freshmen that return to UO for a second year.<sup>14</sup>



#### Performance Trend:

- UO has steadily increased the proportion of freshmen persisting to the second year, achieving a high of 83 percent in 2001-02.

#### Rationale for Future Targets:

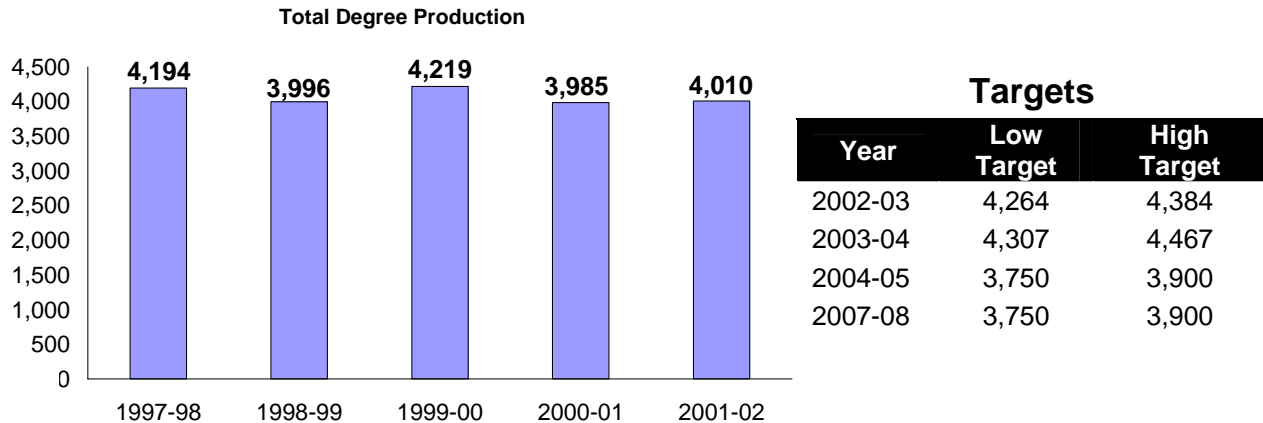
- The UO has made significant improvement in persistence during the past five years. The uncertain economic situation may significantly impact the institution's ability to retain students beyond current experienced persistence rates. However, the UO intends to continue initiatives aimed at maintaining persistence, including:
  - Support of freshmen learning communities such as Freshman Interest Groups and Freshman Seminars.
  - Expanding the Honors Halls Advisory Board into the Residential Academy, a program that enables students to create programs that stimulate intellectual activity in the UO residence halls.
  - Investigating the impact of need-based and merit-based financial assistance on persistence and implementing appropriate changes to make the most strategic use of limited funds.
  - Continued focus on retention by the deans, Enrollment Management Council, and other appropriate committees.

<sup>14</sup> For example, data for 2001-02 reflect the number of UO freshmen who entered in fall 2001 and were still enrolled at UO in fall 2002.

## Performance Indicator Targets and Other Institutional Goals for 2003-04

### University of Oregon Performance Indicator Target Detail

**Total Degree Production.** Bachelor's, master's, doctoral, and first professional degrees awarded in a given academic year.



**Performance Trend:**

- Total degrees awarded have fluctuated slightly since 1997-98, with a peak in 1999-00.

**Rationale for Future Targets:**

As the UO manages within current budget constraints, the size of the admitted entering class will continue to decline. This will result in fewer degrees being awarded at the undergraduate level that will offset gains from continued improvement in persistence rates.

## Performance Indicator Targets and Other Institutional Goals for 2003-04

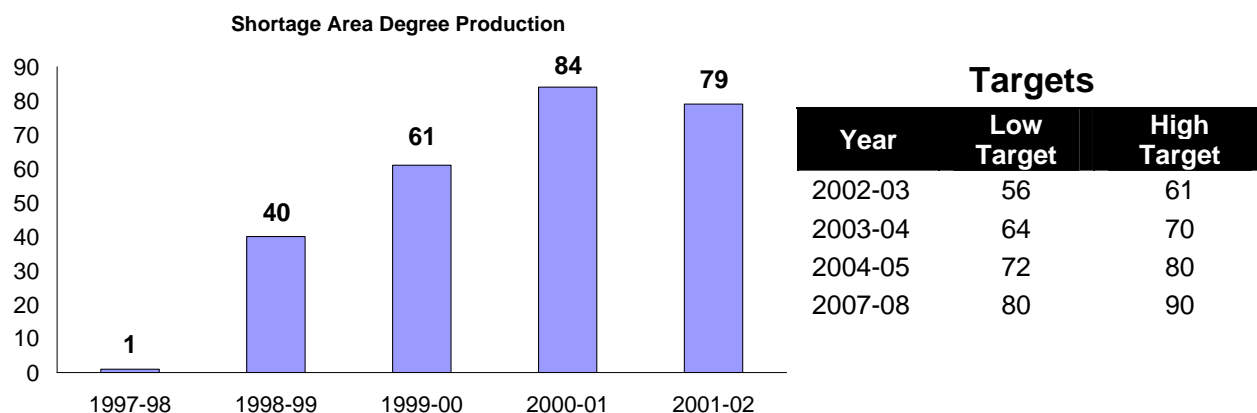
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### University of Oregon Performance Indicator Target Detail

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**Licenses Produced in K-12 Administration.** Number of degrees produced in this Oregon Shortage Area.



**Performance Trend:**

- K-12 administrative licenses have increased sharply since 1997-98, with numbers in the 80 range in the most recent two years.

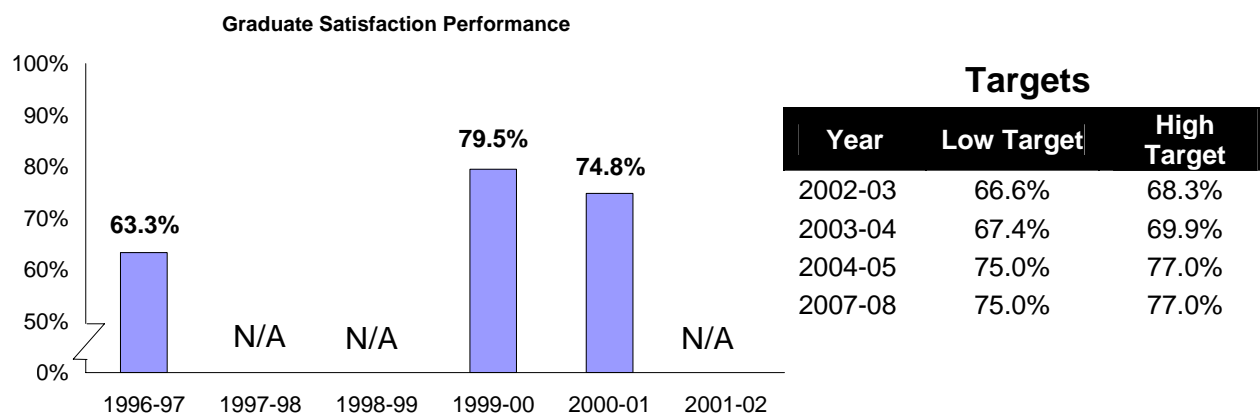
**Rationale for Future Targets:**

The demand for administrative licensure programs continues to be strong and the number of students enrolled is close to capacity. Therefore, the number of endorsement recipients is expected to remain constant. The College of Education continues to receive requests to provide opportunities for administrative licensure programs and it will accommodate these needs to the extent possible within the faculty and financial resources available.

## Performance Indicator Targets and Other Institutional Goals for 2003-04

### University of Oregon Performance Indicator Target Detail

**Recent Graduate Satisfaction.** Recent bachelor's degree recipients were asked to rank the overall quality of their educational experience on a scale of 1 to 5 (with 1 as low and 5 as high). Scores reported include 4s and 5s combined.<sup>15</sup>



#### Performance Trend:

- The rating of the overall quality of the education received at UO increased by nearly 12 percentage points from 1996-97 to 2000-01.

#### Rationale for Future Targets:

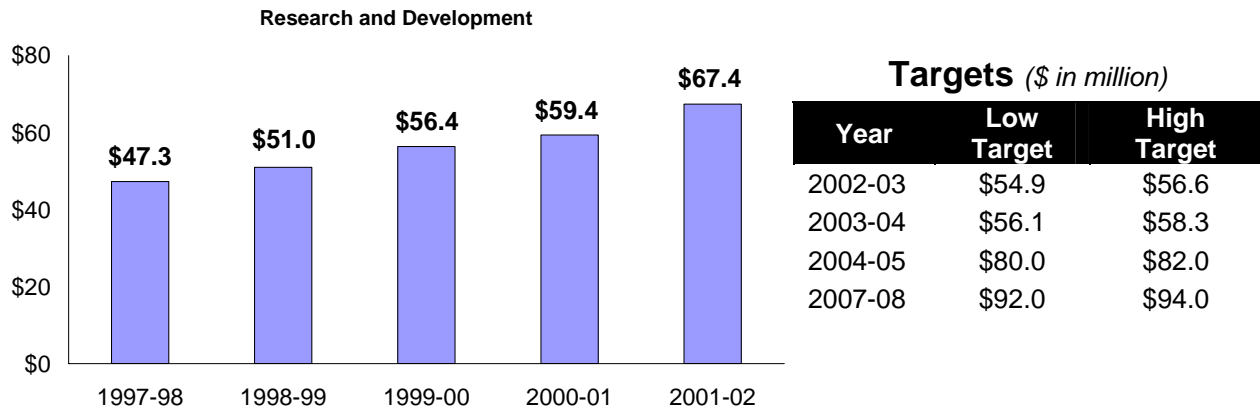
- The UO's goal is to achieve satisfaction ratings at this level by continuing to offer high quality educational experiences and excellent services to students.
- The UO has expanded small group activities within courses to provide further opportunities for students to learn to question critically, think logically, communicate clearly, act creatively, and live ethically. Students also have access to living and learning situations such as Freshman Interest Group (FIG) Residence Halls and the Residential Academy. The UO has also increased its emphasis on opportunities for Participatory Learning Experiences (PLEs) and internship programs that allow students to earn academic credit while exploring career options.
- The UO has also focused in degree planning on promoting minors, resulting in an increased number of students pairing liberal arts majors with professional school minors (e.g. more than 2,100 undergraduates with majors in the College of Arts and Sciences have also declared a minor in Business Administration). In addition, the UO has increased career services available to students in its professional schools and offers the Degrees With Distinction Program.

<sup>15</sup> In the future, this survey will be conducted every other year by OUS Office of Planning.

## Performance Indicator Targets and Other Institutional Goals for 2003-04

### University of Oregon Performance Indicator Target Detail

**Research and Development (R&D)** Annual expenditures for research, training, teaching, and similar activities supported by grants from federal and private sources (dollars in millions).



Performance Trend:

- UO saw a growth of \$20 million in R&D expenditures from 1997-98 to 2001-02. This represents a 42 percent increase (not adjusted for inflation).

Rationale for Future Targets:

The UO expects the recent 10 percent growth per year to slow to approximately 5 percent per year based on the realities of the federal budget and the expectation that it will not be possible to increase the size of the faculty beyond current numbers. The UO continues to place emphasis on providing grant writing services, promoting corporate and financial giving, and taking maximum advantage of the opportunities associated with the OCKED and signature research funding opportunities provided during the recent legislative session. Private funding for research endeavors is a particular emphasis in the UO's fund raising campaign.

## Performance Indicator Targets and Other Institutional Goals for 2003-04

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### Mission Specific Indicators Selected by UO Performance Indicator Target Detail

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**Competitive Faculty Compensation.** Average compensation of UO faculty as a percent of average faculty compensation at institutions in UO's peer group.

Year	Performance	Low Target	High Target
2000-01	85.7%	87.0%	87.5%
2001-02	83.8%	89.0%	90.0%
2002-03		91.0%	92.5%
2003-04		93.0%	95.0%
2004-05		83.8%	85.0%
2007-08		83.8%	85.0%

Note: Data excludes instructor rank; the percentages vary slightly from OUS data, which includes this rank.

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#### Performance Trend:

- Average faculty compensation at the UO has not improved and has been declining relative to average faculty compensation at peer institutions.

#### Rationale for Future Targets:

The UO has made a commitment to faculty to maintain progress in this area and our commitment to this goal remains strong in the long term. However, given the current funding constraints and the salary freeze, the UO will continue to lose ground on this indicator. This goal is strongly related to the UO's reputation and to its future as a member of the Association of American Universities, making it essential that the institution focus attention on how to come closer to attaining its goals in this area.

## Performance Indicator Targets and Other Institutional Goals for 2003-04

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### Mission Specific Indicators Selected by UO Performance Indicator Target Detail

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**Research and Economic Development Index.** The ratio of industrial support for R&D, income generated from technology transfer, and jobs supported by R&D of UO compared to that of the average of the UO peer group.

Year	Performance	Low Target	High Target
1999-00	2.9		
2000-01	4.4	2.3	2.4
2001-02	4.6	2.6	2.7
2002-03		2.8	3.0
2003-04		3.1	3.2
2004-05		5.5	5.7
2007-08		7.3	7.5

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#### Performance Trend:

- This indicator shows improvement, but the data are available for only two years.

#### Rationale for Future Targets:

- The UO is developing a strong track record in technology transfer and corporate funding. This progress is expected to continue with a 10 percent growth rate per year. This target recognizes the need for economic development activity with significant industrial support for R&D, resulting in income generated by both technology transfer and the jobs created.
- We have had an increase of 35 percent in competitively awarded grants and contracts since FY 2000-01, a doubling in sponsored funding from private sources alone between FY 2001-02 and FY 2002-03, and a doubling of licenses related to technology transfer in the private sector in the same time period.

**PERFORMANCE INDICATOR TARGETS AND OTHER INSTITUTIONAL GOALS**

WESTERN OREGON UNIVERSITY

President Philip W. Conn

*Performance Indicators*

For the past decade, WOU has experienced unprecedented enrollment growth. Its overall student headcount and FTE enrollment grew by nearly one third with headcount enrollment now at 5,000 students and annual FTE enrollment approaching 4,500 FTE. This growth is due, in part, to 15 new degree offerings in the Arts and Sciences while maintaining a large, high quality teacher education program at the bachelor's and master's degree levels. This growth has occurred during a protracted period of chronic under-funding and budget reductions. With budget reductions and student tuition costs still accelerating, it is clear that any new gains on key OUS performance indicators must be made without incurring additional expenses and without depending on increased or even stable state funding.

Given this "no new cost, no help" environment, WOU will set more modest performance targets than in past years. We think that setting modest attainable targets is better than failing to meet grander, wishful goals. Therefore, there is no attempt made here to set "high" and "low" targets. Nor is there an attempt to predict goals beyond the "near" future and "real" present. Longer-term goal setting is happening now as University-wide master planning is underway. This planning, to be concluded in the spring of 2004, will yield sharper university goals that, in turn, will enable setting longer-term performance indicator targets.

*Shared OUS Indicators*

- **Student Persistence:** WOU will maintain its high (by national standards) freshman to sophomore year persistence rate at the 70 to 75 percent level. Strategies will be found to mitigate the tuition and fee pressures, which may adversely affect retention in direct or indirect ways.
- **Student satisfaction:** Student satisfaction with the undergraduate experience at WOU will continue to rise given a renewed emphasis on career counseling, service learning, and practicum work experiences.
- **Research and Development:** Faculty research and training grant activity will continue to grow beyond the \$8 million level as an important way to replace funding lost for such purposes in the university education and general portion of the budget.
- **Degrees awarded:** Degree production will be maintained at current levels for the near future or may decline slightly at the graduate level as school districts further lose the ability to hire replacement teachers. The importance of teacher education to the WOU mission means that short- and long-term teacher supply and demand forces affect program enrollment and graduation numbers.
- **Degrees in shortage areas:** Computer science and information systems bachelor's degree numbers will continue to increase without new external funding for these programs. More strenuous recruitment and community college articulation efforts will replace special funding support as a factor in program expansion.

## Performance Indicator Targets and Other Institutional Goals for 2003-04

### Institution Specific Indicators

- **Six year Bachelors degree completion rates** need to be improved from the last calculated (1996) level of 32 percent, once student stop-in/stop-out registration habits are better understood. There is evidence of increasing numbers of students alternating terms between work and school in order to meet tuition costs. Some students alternate between enrolling in community colleges and in WOU to cut costs.
- **Undergraduate Ethnic Diversity** is a new goal being formulated for WOU. The University is in the epicenter of a rapidly changing demography. Being responsive to this change is important to a school that prides itself on providing access for first generation students.

### Other Institutional Goals

Maintaining affordable access for all students while improving the ethnic diversity will prove to be a driving feature of strategic planning now underway. Other drivers include the need to improve University Foundation portfolios and improved alumni giving. Supporting faculty research activities will continue as a strategic priority. Improving the quality co-curricular student life on and off the classroom in Monmouth will also be reexamined as a strategic factor in student recruitment and retention.

# Performance Indicator Targets and Other Institutional Goals for 2003-04

## Western Oregon University Performance Indicator Target Summary, 2003-04

	<i>Common to All Institutions</i>					<i>Selected by Institution</i>	
	Retention <sup>1</sup>	Total Degrees <sup>2</sup>	Shortage Degrees <sup>3</sup>	Graduate Rating <sup>4</sup>	R & D Expend <sup>5</sup>	Bachelor's Degree Completion <sup>6</sup>	Under-represented Minorities Persistence <sup>7</sup>
<b>Results</b>							
1999-00		67.4	990	35	81.8	\$6.3	42.4
2000-01		69.6	645	27	80.6	\$7.7	38.2
2001-02		74.9	746	24	not available	\$8.6	31.8
2002-03		pending	pending	pending	pending	pending	pending
<b>Targets</b>							
2002-03 (set 2001)	Low	71.4	948	37	77.9	\$5.7	41.8
	High	73.2	978	39	79.8	\$6.2	42.0
2003-04 (set 2001)	Low	72.2	956	39	78.9	\$5.9	42.2
	High	74.6	996	42	81.7	\$6.5	42.5
2004-05 (set 2003)	Low	75.0	760	40	82.0	\$8.9	35.0
	High						
2007-08 (set 2003)	Low	75.0	776	45	84.0	\$9.5	45.0
	High						
<b>Low Target to Last Results</b>							
T 04-05	Low	0.1	14	16	1.4	\$0.3	3.2
T 07-08	Low	0.1	30	21	3.4	\$0.9	13.2
<b>High Target to Last Results</b>							
T 04-05	High						
T 07-08	High						

Data under development

Notes:

<sup>1</sup> Percent of first-time, full-time freshmen who return for a second year at WOU.

<sup>2</sup> Total degrees (bachelor's and master's) awarded.

<sup>3</sup> WOU selected computer science fields.

<sup>4</sup> Percent of WOU bachelor's degree recipients rating the quality of the overall experiences as "very good" or higher on a 5-point scale (with 5 as "excellent").

<sup>5</sup> Research and development expenditures using grant funds from external sources (e.g., federal, private).

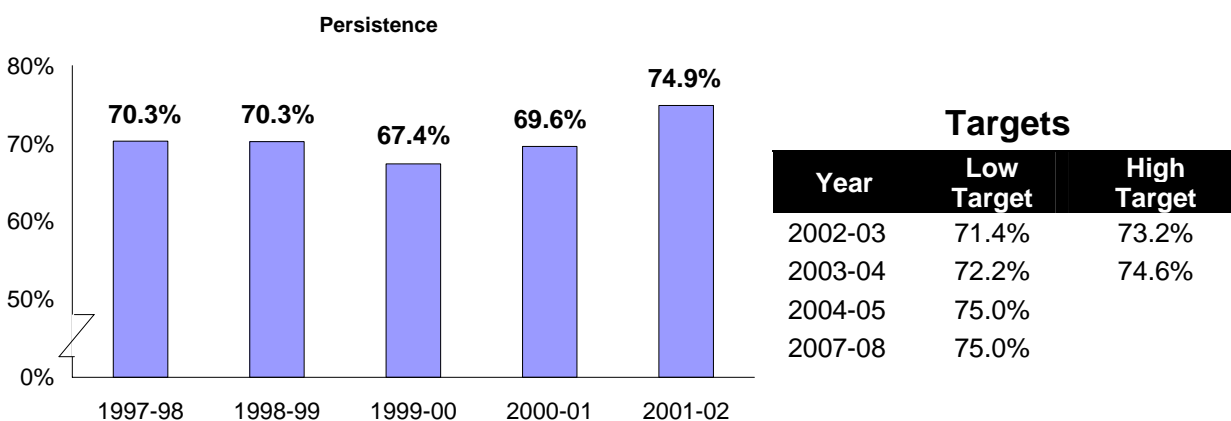
<sup>6</sup> Percent of entering freshmen who graduate by the end of six years (150% time).

<sup>7</sup> Persistence of freshmen from under-represented racial/ethnic groups. (Indicator is under development.)

## Performance Indicator Targets and Other Institutional Goals for 2003-04

### Western Oregon University Performance Indicator Target Detail

**Freshman Persistence/Retention.** Full-time freshmen that return to WOU for a second year.<sup>16</sup>



#### Performance Trend:

- WOU increased overall 4.6 percentage points from 1997-98 to 2001-02. WOU has turned around a two-year downward trend, gaining 5 percentage points between 2000-01 compared to 2001-02.

#### Rationale for Future Targets:

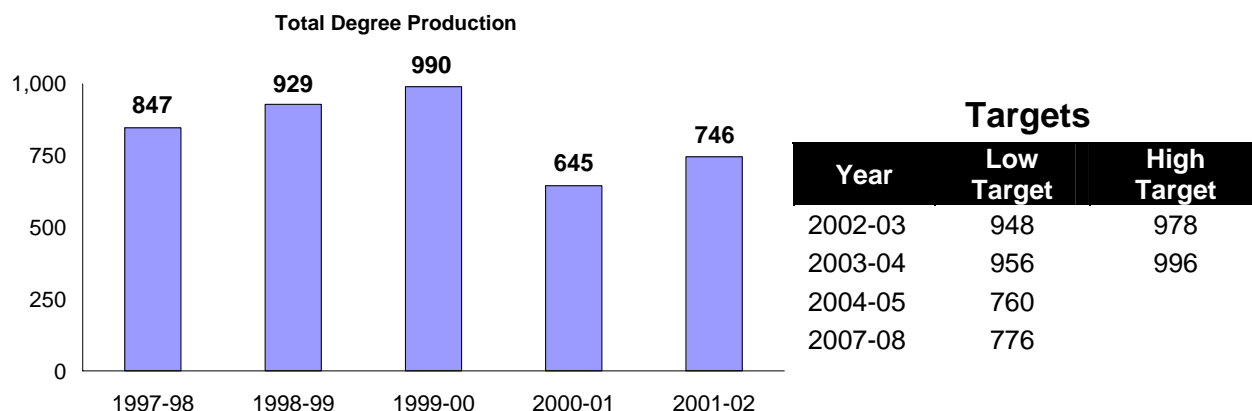
Special three-term Freshman Year Experience courses have been designed to remediate basic academic and study skill problems for struggling students. A new University Writing Center, coupled with the special counseling and support provided in the Academic Learning and Advising Center, partially account for student persistence gains to date. Funding and staffing for this student retention work has been “held harmless” in regard to budget cuts. However, future significant gains in student persistence will be hard won as no other university funding can be redirected to expand this labor intensive counseling, tutoring, and special instruction effort.

It is therefore optimistic to predict new, large gains in student persistence numbers. We will be relieved if persistence rates do not recess slightly. It is also reasonable to assume that tuition cost increases will be a student attrition factor. There is mounting evidence here that students are “stopping out” rather than “dropping out” based on their ability to pay tuition and other costs related to maintaining continuous enrollment.

<sup>16</sup> For example, data for 2001-02 reflect the number of WOU freshmen who entered in fall 2001 and were still enrolled at WOU in fall 2002.

Western Oregon University  
Performance Indicator Target Detail

**Total Degree Production.** Number of bachelor's and master's degrees awarded in a given academic year.



Performance Trend:

- After a steady rise in degree production, WOU's production dropped from a high of 990 in 1999-00 to 746 in 2001-02, representing a loss of 244 degrees or a loss of one-third.

Rationale for Future Targets:

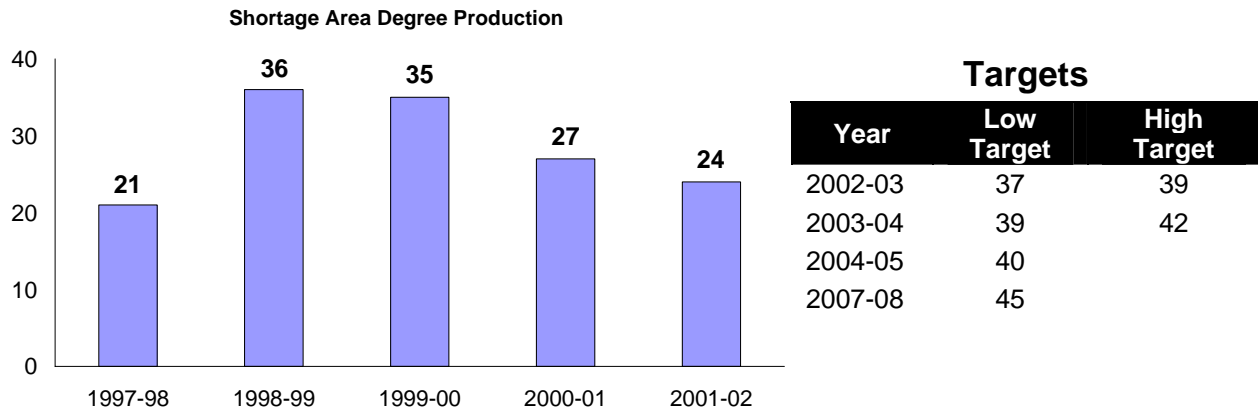
Undergraduate enrollment growth will remain in the 1 to 3 percent per annum range. Slower enrollment growth will result in a stable graduation growth rate of about 2 percent for the next few years. WOU graduate degree production is almost entirely dependent on in-service teachers returning for master's degrees, licensure, and special certification. As school districts eliminate financial aid to teachers for master's degree study, WOU degree production will decline. The decline will be partially offset by undergraduate enrollment and degree production growth.

Western Oregon University  
Performance Indicator Target Detail

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**Degree Production in Computer Sciences.** Number of degrees produced in this Oregon Shortage Area.



Performance Trend:

- Climbing to 36 in 1998-99, degrees in computer sciences steadily declined to 24 in 2001-02.

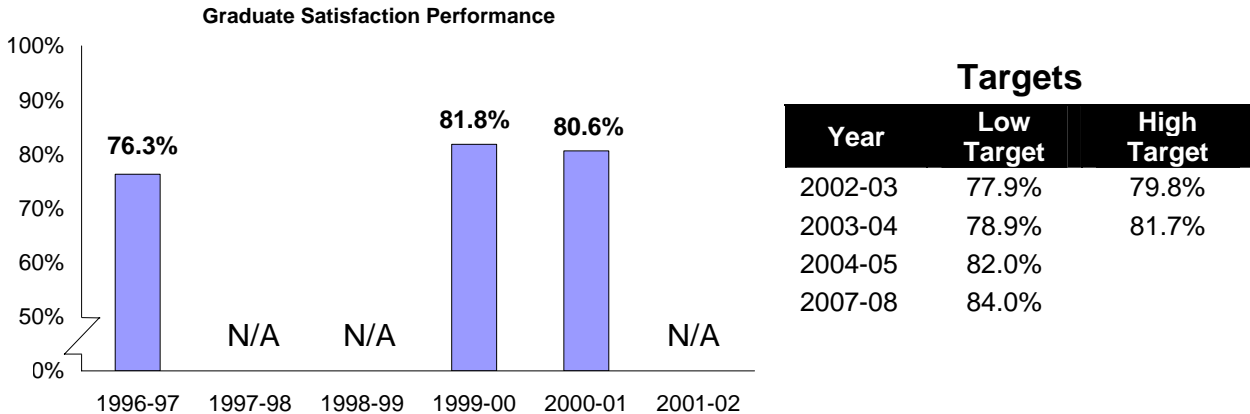
Rationale for Future Targets:

- “Shortage” degrees are defined here as B.A./B.S. degrees in Computer Science and Information Systems. The lower performance in recent years stems from fewer students entering the pipeline for this degree.
- Based on current student enrollment in the CS and IS degree programs, degree production will meet or surpass the indicated targets.

## Performance Indicator Targets and Other Institutional Goals for 2003-04

### Western Oregon University Performance Indicator Target Detail

**Recent Graduate Satisfaction.** Recent bachelor's degree recipients were asked to rank the overall quality of their educational experience on a scale of 1 to 5 (with 1 as low and 5 as high). Scores reported include 4s and 5s combined.<sup>17</sup>



**Performance trend:**

- The rating of the overall quality of the education experience by WOU bachelor's graduates improved four percentage points in 2000-01 compared to 1997-97. The average rating has remained stable.

**Rationale for future targets:**

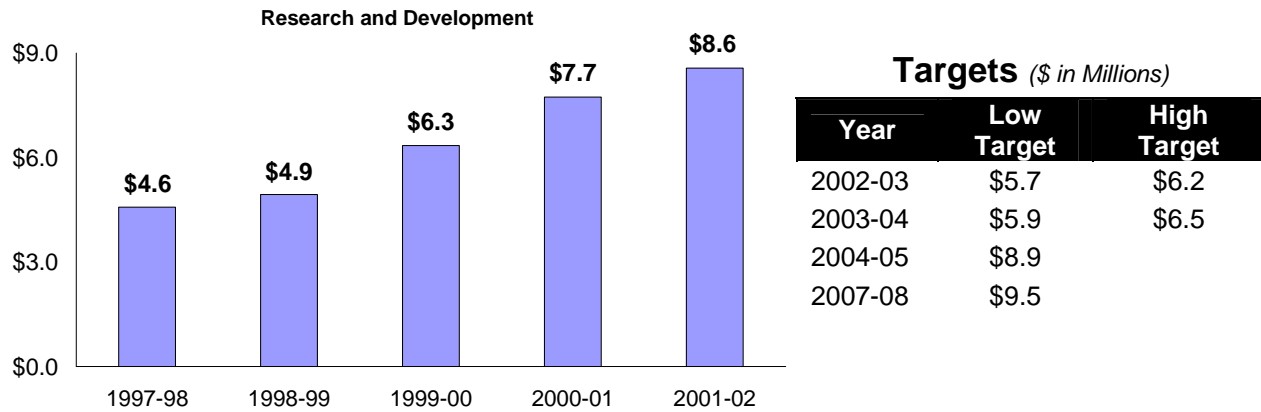
WOU will continue to strive to increase the satisfaction of recent graduates by focusing on key drivers: satisfaction with education, support services, and the educational climate.

<sup>17</sup> In the future, this survey will be conducted every other year by OUS Office of Planning.

## Performance Indicator Targets and Other Institutional Goals for 2003-04

### Western Oregon University Performance Indicator Target Detail

**Research and Development (R&D).** Annual expenditures for research, training/teaching, and similar activities supported by grants from federal and private sources (dollars in millions).



**Performance Trend:**

- WOU increased R&D expenditures by 87 percent in 2001-02 compared to 1997-98, with a gain of \$4 million.

**Rationale for Future Targets:**

Research and training grant activity will continue to grow at an approximate rate of 3 percent per annum. Teaching Research Division and faculty research grants from DOE, NIH, and NSF grant sources will continue at current levels with increased funding awards coming from DOJ block grants to our Western Regional Community Oriented Policing Center. Federal training grant funding of the WOU Regional Resource center on Deafness will also contribute to a modest increase in overall university grant research and grant activity.

## Performance Indicator Targets and Other Institutional Goals for 2003-04

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### Mission Specific Indicators Selected by WOU Performance Indicator Target Detail

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**Bachelor's Degree Completion.** Percent of freshman cohort starting and completing bachelor's degrees at WOU within six years (150 percent time).

Year	Performance	Low Target	High Target
1999-00	42.4%		
2000-01	38.2%		
2001-02	31.8%	41.4%	41.5%
2002-03		41.8%	42.0%
2003-04		42.2%	42.5%
2004-05		35.0%	
2007-08		45.0%	

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#### Performance Trend:

- Bachelor's degree completion rates gradually increased between 1997-98 and 1999-00, but have declined sharply since that time.

#### Rationale for Future Targets:

The 2004-05 target is set lower based on the decrease in performance during 2000-01 and 2001-02 but the five-year target in 2007-08 is set to exceed the highest recent performance (in 1999-00).

It is expected that student retention efforts enacted since 1996 will show a marked increase in six-year bachelor's degree completion rates. The effect of tuition increases on graduation rates is a variable that remains to be measured. It could adversely affect these targets.

## Mission Specific Indicators Selected by WOU Performance Indicator Target Detail

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**Success of students of color** Number of full-time freshmen from under-represented racial/ethnic groups who persist to their second year.

Year	Performance	Low Target	High Target
2000-01			
2001-02			
2002-03			
2003-04		<i>Developing data</i>	
2004-05			
2007-08			

Performance Trend:

- Developing data

Results Compared to Targets:

- Developing data

Rationale for Future Targets:

Oregon and the Willamette Valley region are experiencing a rapid change in the ethnic diversity of its population. For example, Hispanic students entering high schools in Marion and Polk counties alone have increased substantially in the last ten years. High school attendance and completion rates for all under-represented minority students should predict a more ethnically diverse WOU freshmen class. Using Academic Year 2003-04 as a base year from which to measure changes, WOU will increase the enrollment of all under-represented minorities in future freshman classes. Improvement targets of at least 3-5 percent over base numbers seem reasonable to attain within a two to three year period.

## OUS Data Dictionary for Key Performance Indicators

The common indicators approved by the Board include twelve indicators as follows:

### 1. Total Credit Enrollment

Defined: The total of all students enrolled in an OUS institution during fall term, regardless of course load. Both regular and extended enrollment is included in this number. Students are counted only once with one exception, students who completed a degree and enrolled as a student at a different level of study in the same academic year are counted twice.

Source: OUS Institutional Research Services, fall fourth-week enrollment reports.

### 2. New Undergraduate Enrollment

Defined: Oregon residence codes by admission mode as defined by Board including regular and extended enrollment in credit courses. Data presented as transfer students by source, new from high school, continuing undergraduates, returning undergraduates, and total undergraduates.

- Includes both full- and part-time students and regular and extended studies enrollment.
- Excludes all non-admitted students, post-baccalaureate, and graduate students.

Note: “New from high school” does not match cohort used in tracking persistence and graduation rates of first-time, full-time freshmen.

Source: OUS Institutional Research Services, fall fourth-week enrollment reports.

### 3. Freshman Persistence

Defined. Includes full-time freshmen entering with fewer than 12 hours or less in college-level transfer credit, as defined by the SCARF Application Decision element. Includes regular and extended enrollment. Cohort is tracked fall-to-fall (fourth week) for one year. Fall term freshman cohort drawn from the fourth week fall file.

Source: OUS Institutional Research Services, *Retention, Attrition, and Graduation of OUS Freshmen* reports, IPEDS Fall Cohorts completed.

### 4. Bachelor’s Degree Completion (Six-year Graduation Rates)

Defined: Includes only full-time freshmen entering with fewer than 12 hours of transfer credit, as defined by the SCARF Application Decision element. Fall term freshman cohort drawn from the fall fourth week file. Includes regular and extended enrollment. Cohort is tracked fall-to-fall (fourth week) for six years, ending summer of the 7<sup>th</sup> year. Degrees counted for an academic year are those awarded fall through the following summer following the IPEDS Graduation Rate Survey Defined.

Source: OUS Institutional Research Services, *Retention, Attrition, and Graduation of OUS Freshmen* reports, IPEDS Fall Cohorts completed.

#### 5. **Total Degree Production**

Defined: Bachelor's, master's, doctoral, and first professional degrees awarded annually. Degrees counted for an academic year are those awarded summer through the following spring, which approximates the fiscal year (e.g., Summer 1998, Fall 1998, Winter 1999, and Spring 1999). Students who earn a single degree with more than one major are counted only once.

Source: OUS Institutional Research Services, *Integrated Postsecondary Education Data System (IPEDS) Completions Survey* reports.

#### 6. **Degree Production in Shortage Areas**

Defined: Campuses selected one of two identified shortages areas in Oregon. Bachelor's, master's, doctoral degrees awarded in selected fields by Classification of Instructional Program code (CIP code system was developed by the National Center for Educational Statistics to facilitate program comparisons among institutions). Degrees counted for academic years are those awarded summer through the following spring terms (e.g., Summer 1998, Fall 1998, Winter 1999, and Spring 1999).

Current degree shortages in Oregon include engineering and computer science disciplines and selected teacher education licensure areas.

- Engineering and related disciplines include engineering (14), engineering-related technologies (15), and computer and information sciences (11).
- Teacher education shortage fields include special education, mathematics, science (physics and chemistry), school counseling, ESL/bilingual education, administration (principals and superintendents), Spanish, and library media.

Source: OUS Institutional Research Services, *Integrated Postsecondary Education Data System (IPEDS) Completions Survey* reports.

#### 7. **Recent Graduate Satisfaction**

Defined: Bachelor degree recipients awarded a degree in any term of a given academic year (summer through following spring) are surveyed six to twelve months following graduation. Surveys are conducted every other academic year beginning with the graduates of the 1994-95 academic year. Graduates are asked to rank overall quality on a scale of 1 to 5 (5 is high). Scores reported include 4s and 5s combined.

Source: OUS Academic Affairs, *The Status of OUS Baccalaureate Graduates: One Year Later* reports.

**8. Graduate Success**

Defined: Bachelor's graduates tracked six to twelve months after degree award (see *Recent Graduate Satisfaction*) to determine the status of graduates such as employment (full- or part-time, income, and occupation), education (graduate or professional schools, continuing education, post-baccalaureate), and other information.

Source: OUS Academic Affairs, *The Status of OUS Baccalaureate Graduates: One Year Later* reports.

**9. Faculty Compensation**

Defined: Source data are reported by universities on November 30<sup>th</sup> of each academic year; therefore, increases awarded after November are not included in the OUS report. Peer groups are used to compare faculty compensation at OUS universities by type of institution: research/doctoral (OSU, PSU, UO), masters/comprehensive (EOU, SOU, WOU), and specialty institution (OIT). Each group is then ranked among a shared list of institutional peers across all faculty ranks across all disciplines. To compare all ranks, the faculty distribution is standardized to 35% professors, 30% associate professors, 30% assistant professors, and 5% instructors. As of 2000-01, where no instructors are reported, the calculation of the all-ranks average uses the average compensation of instructors for all Category I four-year public institutions

Source: OUS Institutional Research Services compiles data from the American Association of University Professors (AAUP) as published in *ACADEME: The Annual Report on the Economic Status of the Profession* in March/April in a given year.

**10. Sponsored Research and Other Support**

Defined: Includes restricted fund expenditures for sponsored research, teaching/training grants, and student services grants, library grants and similar support but excludes student financial aid. Sponsored research and other support generated by the Chancellor's Office is excluded from institution reports but included on the System report.

Source: OUS Annual Financial Reports, Controller's Office.

Note: The impact of the changes in GASB 35 requirements on performance indicators will be discussed this year.

**11. Philanthropic Support**

Defined: Reflects the net assets of each foundation plus the value of obligation to the individual university (if included as a liability) as reported in the audited financial statements of each institution.

Source: OUS Annual Financial Statements.

Note: Requirements for foundations to submit audited reports at the end of the fiscal year will be implemented.

## 12. Internships

Defined: Reflects the proportion of recent graduates saying they completed an internship experience as part of their academic program.

Source: OUS Survey of Recent Graduates: One Year Later. Beginning fall 2002, course coding will allow collecting data from SCARF database.