



Western Oregon
UNIVERSITY

Business Plan and Request for WOU Institutional Governing Board

Submitted to Oregon State Board of Higher Education

March 1, 2014





TABLE OF CONTENTS

Letter from the President	1
WOU's Commitment to Oregon's 40-40-20 Goals	2
Section One: Introduction to WOU	
A. Western Oregon University's Mission	3
B. Academic overview	3
C. Highlights of selected programs to attract and retain students	8
D. Accreditation at WOU	9
E. Financial performance: fund balance as a % of operating revenue	9
Section Two: WOU Serves Oregon	
A. WOU's students are predominately Oregon residents	11
B. WOU serves first-generation students	12
C. WOU serves economically-disadvantaged students	13
D. WOU excels in serving Oregon residents, especially under-represented minorities	14
Section Three: Academic Capacity	
A. Students	17
B. Academic programs	19
C. Supporting faculty and teaching	20
D. WOU's unique resources	20
E. Facilities for growth	22
Section Four: Financial Forecast	
A. Commentary on 10-year financial forecast	23
B. Changes from prior 10-year forecast	24
C. Financial forecast	25
Appendices	31



2013 WOU Foundation Scholarship recipients with the word they chose to describe their thoughts at the award ceremony.

March 1, 2014

Dear members of the Oregon State Board of Higher Education,

Western Oregon University (WOU) requests its own institutional board of trustees for governance as authorized in Senate Bill 270. I am submitting this business plan, prepared according to guidelines developed by the University Governance Work Group, in support of our application. This business plan provides an overview of the institution, and its strengths, capacity and future strategies to serve Oregon's higher education goals for an educated citizenry.

A board of trustees dedicated to the university's success will position us to continue doing what we do best: **educating Oregonians while maintaining WOU as a fiscally healthy institution.** Our size enables individualized attention, excellent faculty and support services, and mentoring that supports students; yet we also envision continued expansion of innovative programs, facilities and ways in which courses are delivered. Fundamentally, WOU will play a critical role in helping Oregon achieve its goals for a competitive, educated workforce.

Therefore, the faculty, students, and staff at Western Oregon University have become united in our support of pursuing an independent governing board structure. The Associated Students of Western Oregon University (ASWOU), Administrative Support Council, Faculty Senate, the WOU Foundation Board of Directors, and local community leadership have expressed support for this decision; copies of these letters are included as Appendix E.

WOU is well-positioned to transition to an independent governing board. We have collectively managed our fiscal resources to protect and enhance the institution, most noticeably through our proactive 'Window of Opportunity' initiative. At the same time, we have continued to work to attract new students as well as to improve student retention and graduation. We are thoughtful in introducing academic programs, most recently, Visual Communication Design, Early Childhood Studies, Autism Spectrum Disorders certificate, and the first Applied Baccalaureate degrees (Gerontology and Psychology) in OUS after the passage of House Bill 3093. Last but not least, we have a strong faculty working collaboratively with an organizationally-lean staff of administration professionals. Overall, these attributes are positive indicators of the institution's capacity to engage in continuous improvement and contribute in a meaningful way to achieve Oregon's 40-40-20 goal.



Mark Weiss, President

WOU's Commitment to Oregon's 40-40-20 Goals

The Western Oregon University community – faculty and staff – believes in the power of education to improve individuals' lives, families and communities. We are committed to serving Oregon's students, especially those with greater socio-economic or socio-cultural obstacles to entering college or completing a degree.

WOU's focus as a teaching-learning institution means that classes are sized to improve learning outcomes (average size is about 25 students), taught by faculty with advanced degrees rather than by graduate assistants, with easily accessible faculty and staff who remember the student from one encounter to the next. This environment helps *all* students excel, but it is particularly critical to students that may need more mentoring to succeed at the university level. Such students may be the first in their family to experience college, come from a lower socio-economic level, have a diploma from a high school with minimal college preparation, have a physical or psychological disability or face other challenges to academic success. Additionally, our attention to the individual also assists students who may come to WOU as military veterans or working adults. The success of *all* of these students is critical to achieving Oregon's 40-40-20 goals.

Our mission is to provide effective learning opportunities in an accessible and diverse campus community; actions, not words, demonstrate this mission. We have numerous initiatives and collaborative partnerships that further Oregon's 40-40-20 goals. For example, our partnership with the Salem-Keizer School District helps nearly 15,000 students prepare to attend college – ***and it makes a difference***. Since 2006, approximately 99% of the high school students in one program graduated, and nearly 78% enrolled in college.

Other activities range from one-time events to ongoing programs, such as:

- Mentoring middle-school students since 1999 (Talmadge Middle School, Independence, OR).
- Encouraging female high school students to pursue education and careers in mathematics.
- Hosting the annual Cesar E. Chavez Leadership Conference for Latino high school students. (Attendees for 2014 are estimated at 1,700 students.) The day-long event highlights topics such as completing high school, transitioning to college, and serving one's community. (WOU video on the 2013 conference can be accessed at: <http://www.youtube.com/watch?v=3xxyeQJdLN8>.)
- Establishing WOU/high school dual-credit programs in Hillsboro (4 subject areas currently) and Woodburn (as of Fall 2014) school districts.
- Partnering with Chemeketa Community College (source for over 50% of the community college transfers to WOU) to support students through dual enrollment, collaborative academic advising, or cooperative financial aid for students enrolled concurrently at both institutions.

The Western Oregon University community invites you to learn more about our institution, and how we contribute to Oregon's future, through this document.

Section One – Introduction to WOU

A. Western Oregon University's Mission¹

Preamble

Oregon's oldest public university, Western Oregon University (WOU), offers exemplary undergraduate and graduate programs in a supportive and rigorous learning environment. WOU works to ensure the success of students and the advancement of knowledge as a service to Oregon and the region. The University works in partnership with PK-12 schools, community colleges, higher education institutions, government, and local and global communities.

Mission Statement

Western Oregon University is a comprehensive public university, operating for the public good, which:

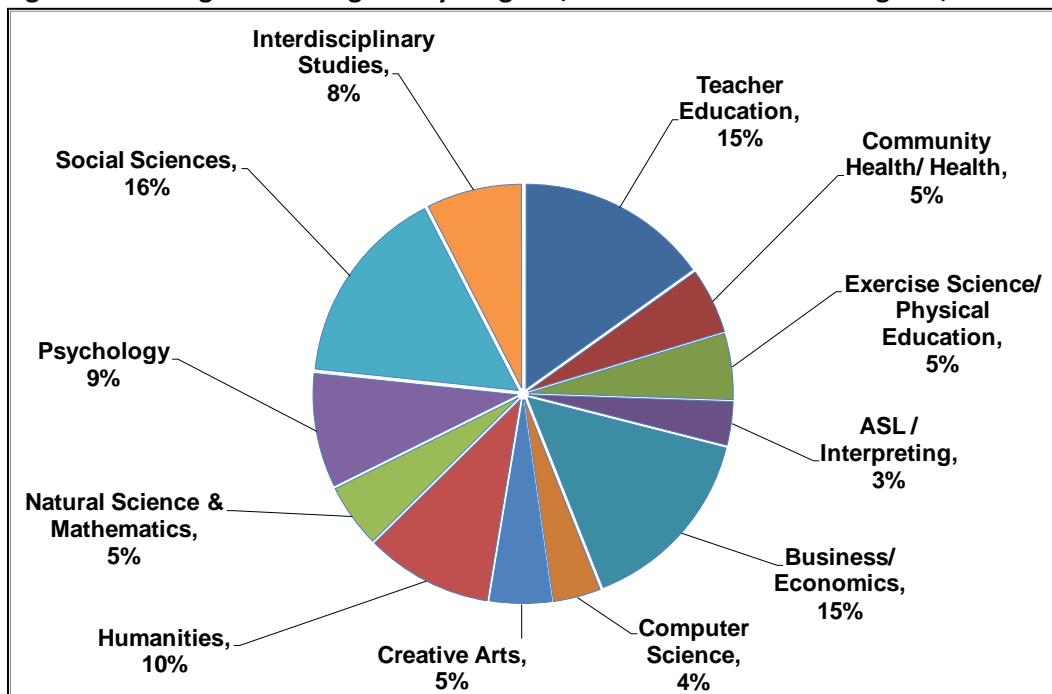
- Provides effective learning opportunities that prepare students for a fulfilling life in a global society;
- Supports an accessible and diverse campus community; and,
- Continuously improves our educational, financial, and environmental sustainability.

B. Academic Overview

1. Degrees and Graduation

WOU is a comprehensive, liberal arts institution awarding endorsements and certificates as well as the Bachelor of Arts, Bachelor of Fine Arts, Bachelor of Music, Bachelor of Science, Applied Baccalaureate, Master of Arts, Master of Music, and Master of Science (Figure 1).

Figure 1. Undergraduate Degrees by Program, % of Three Year Total Degrees, 2010-11 to 2012-2013



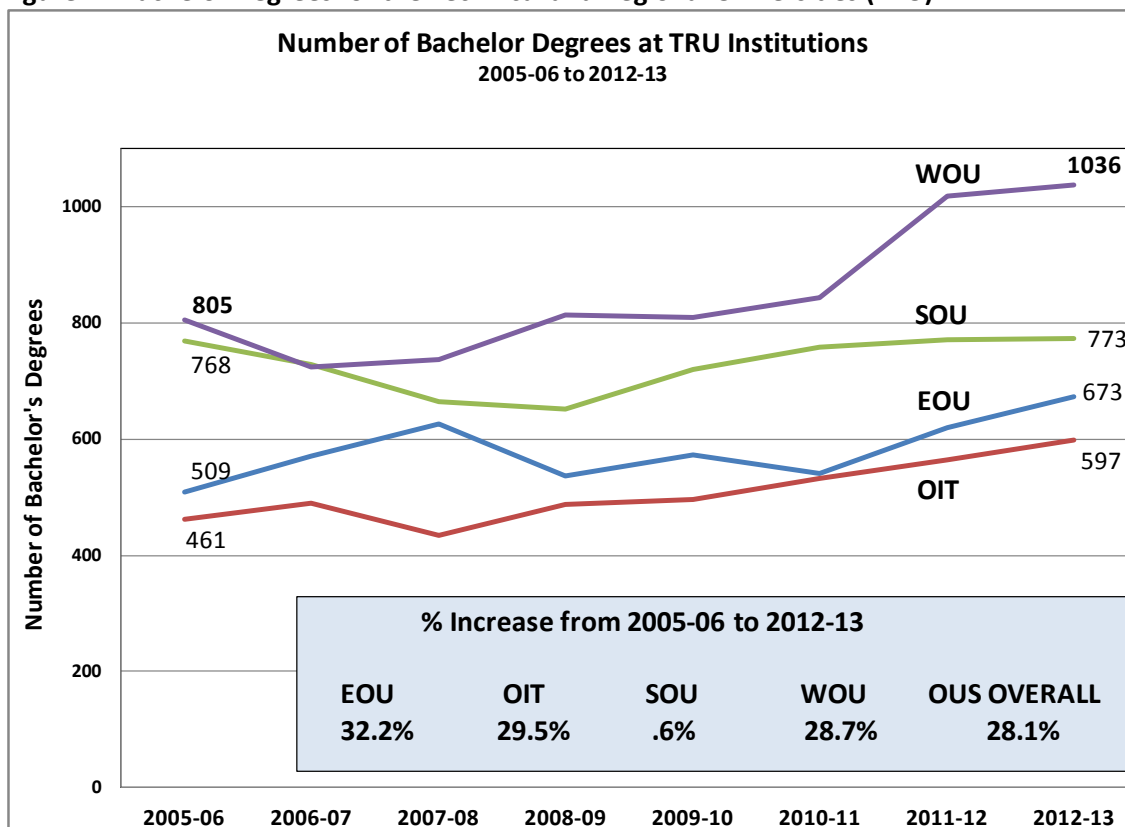
¹ Approved April 28, 2011 by the Oregon State Board of Higher Education.

At WOU, undergraduate students are required to have a minor with their major program of study unless the chosen major is one specifically designed to encompass diverse fields of study. Other academic characteristics of WOU include:

- College of Liberal Arts and Sciences, with 119 tenure line and 82 non-tenure track faculty.
- College of Education, with 36 tenure line and 99 non-tenure track faculty.
- Total 6,234 students (5,291 UG, 943 G) at the end of Fall 2013.
- 62 undergraduate programs (many available as either a BA or BS).
- 9 graduate programs, several of which offer specialization components;
- 83% of degrees awarded in 2012-13 were bachelor’s degrees.
- WOU’s bachelor degrees have **increased slightly ahead of OUS’s** for the last seven years since June 2006; WOU increased 28.7%, OUS increased 28.1% (Figure 2, below).
- **WOU has been recognized with more national awards (13) for advising excellence** from the National Academic Advising Association **than all other OUS universities combined (5).**

Several WOU certificate programs are noteworthy for their career-enhancing potential. The **Autism Spectrum Disorders certificate** enhances special education professionals’ work in the field. Certificates in Crime Analysis, Homeland Security and Community Preparedness, and Teaching English as a Foreign Language are also designed for specific career applications.

Figure 2. Bachelor Degrees for the Technical and Regional Universities (TRU)



In addition to traditional, face-to-face courses, WOU also provides alternative program and course delivery either off campus, across the state at various locations, or online. WOU is enhancing online course delivery by improving its organizational and technical infrastructure; a first step was hiring a seasoned Director with successful experience in transforming the operations, services, and support practices for online delivery.

2. College of Liberal Arts and Sciences (LAS)



LAS offers a diverse range of academic programs in the social and natural sciences, humanities, creative arts and applied areas including business, criminal justice and computer science. Our academic programs strengthen our students' ability to be adaptable and to respond effectively under changing circumstances while simultaneously offering students the opportunity to specialize in numerous high demand areas.

Our applied programs, such as business, criminal justice, computer science, gerontology and visual communication design, relate to specific careers and offer both majors and minors so that students in a liberal arts program may also develop career skills through the minor. Our science, technology, engineering and mathematics (STEM) programs have grown in recent years, particularly as we expanded access to computer science courses, and enhanced life science courses to serve pre-nursing students, many who intend on entering the OHSU Nursing Program on the WOU campus.

The National Center on Education Statistics reports that many lower-income and first-generation students disproportionately choose majors in business, health science/services or vocational/technical fields², and our programs accommodate those interests. (See more information about first generation students at WOU starting on page 12.) While most of our programs are at the undergraduate level, we have developed graduate programs in strategically chosen areas such as Management & Information Systems or Criminal Justice.

In LAS, faculty help students develop skills and connect to career opportunities through internships, service learning, production and performance opportunities, or participation in research projects. For example, the departments of criminal justice, psychology, political science/policy analysis and communications studies provide robust internship experiences. Faculty in the natural sciences engage students in research, and those in creative arts offer students numerous opportunities to apply their performance or creative skills in the community.

² [First Generation Students in Postsecondary Education: A Look at Their College Transcripts](#), NCES 2005-171, by Xianglei Chen and C. Dennis Carroll.

Over the past three years, approximately 8% of all WOU graduates (see Figure 1, page 3) and 10% of all LAS graduates have completed a Bachelor’s degree in interdisciplinary studies (IDS). This program provides a vital pathway to graduation for students whose academic interests span multiple disciplines.

As a degree, IDS is particularly beneficial to students already in the labor market who seek a college degree for career advancement. Many of these “some college” adults have a mix of courses from different institutions that do not fit well into a traditional degree program but can fit in an IDS program. According to the 2011 American Community Survey (U.S. Census Bureau), approximately 27% of all adults in Oregon have some college but have yet to earn a college degree; a solution like the IDS degree serves these adults who are critical to meeting Oregon’s goals.

Peter Cappelli recently argued (*Wall Street Journal*, Nov. 15, 2013) that over-specialization in college comes with significant risks for students, especially those fresh out of high school who may not know their gifts and skills, and more importantly, cannot know what the economy, job market or world will look like in future decades. Western’s academic programs serve our students by providing an education that strengthens our students’ ability to be adaptable and respond effectively to changing circumstances while simultaneously offering students the opportunity to specialize in a number of high-demand areas.



3. College of Education (COE)

Programs in COE include professional preparation in health, education, and human services including teacher preparation, community health education, exercise science, rehabilitation counseling, special education, American Sign Language and interpreting. All programs in COE require a practicum or internship so that students learn to apply skills and knowledge. As a result, COE programs have strong partnerships with school

districts, community organizations, public and private health and human services agencies, and private industry. Just in 2012-13, there were:

- 543 practicum placements, and
- 258 students who worked in 38 Oregon school districts.

COE serves diversity needs in state education by preparing bilingual and ESOL³ teachers in partnership with area school districts. 197 teachers were prepared in 2012-13, through WOU-developed projects such as:

- \$1.9M U.S. Dept. of Education SPELL grant (Sustainable Practices for English Language Learners) for teacher development in ESOL with focus on science, technology, engineering, and mathematics in two school districts that will impact nearly 20%⁴ of Oregon's English Language Learners.
- \$172,000 Project LUISA Title II-A grant to prepare teachers to work with English Language Learners (ELL) in primary and secondary schools.

Western Oregon University is the **second largest preparer of Oregon teachers** (after Portland State University), producing nearly 10% of all newly licensed educators and 20% of those from Oregon's public universities. Since 1999, over 3,100 WOU graduates were hired as educators in Oregon public schools. Ten years later (as of the 2009-2010 school year), 77% of those educators were still teaching in 168 different school districts or 85% of the districts in Oregon⁵.

In addition, our advanced programs are preparing record numbers of teachers to work as reading specialists, technology integrationists, or autism specialists. Key distinctions include:

- WOU's College of Education houses the only Oregon program in American Sign Language and ASL/English Interpreting, a collaborative integration of both hearing and deaf faculty.
- The Masters in Interpreting Studies program was recognized with the 2013 West Region Outstanding Credit Program Award from the University Professional and Continuing Education Association.
- The Rehabilitation Counseling Deafness program is **one of only five** Deaf/Hard of Hearing programs in the U.S. Since 1975, WOU's Rehabilitation Counselor Education program has been continuously awarded long-term training grants by the Rehabilitation Services Administration in the Department of Education; the current cohort includes six disabled, combat veterans.

The COE has an integral, collaborative relationship with the **Teaching Research Institute (TRI)** at WOU, and is well-served by its national reputation in the field of education. TRI has fostered close working relationships with many Oregon schools, school districts and teacher education programs. Although its foundation was in educational research, teacher education and instructional technology, a focus on special education in the mid-1970's led TRI to its continued national prominence in early childhood special education and services to students with deaf-blindness. (TRI is discussed in greater detail on pages 20-21.)

³ English for Speakers of Other Languages

⁴ Cited in Oregon University System 2012 Annual Financial Report, page 7

⁵ Oregon Teachers Standards and Practices Commission

C. Highlights of Selected Programs to Attract and Retain Students

1. Student Enrichment Program (SEP)

SEP improves retention, persistence and graduation rates for individuals who are first-generation, low-income, or have a disability. The program is an intensive mix of educational assessments, academic advising/mentoring and collaborative action plans as well as referrals to other academic support services. It serves a maximum of 400 admitted, undergraduate students through a federal grant/institutional split-funding model (WOU pays for 150 students; US Dept. of Education TRIO grant pays for 250 students). For Fall 2013, WOU's program served 4.68% of students through the federal funds of the TRIO grant. This is the **second highest percentage of all OUS programs**, just behind OIT at 4.70%, and does not take into consideration the additional 150 students that are funded with WOU's institutional dollars. Additionally, WOU's federal TRIO program funding is the **third highest** after UO and PSU⁶. For each of the last five years (Fall 2008- 2012), **first-year retention for new SEP freshmen has surpassed** retention for non-SEP freshmen students⁷.

2. César E. Chávez Leadership Conference (CECLC)

This conference is the premier statewide developmental event for Latino high school students, with nearly 1,700 expected to come to WOU this spring (2014) for a day of educational workshops, visits with college representatives and leadership trainings by nationally recognized speakers. WOU matches twenty \$1,000 scholarships awarded by CECLC, and in 2013, offered an additional twenty \$2,000 scholarships to conference attendees who later enrolled at WOU.

3. Making College Happen

WOU brings Oregon at-risk students to campus to talk about the college search process and increase their likelihood to attend college. Participants learn their admission status before the conclusion of the event, which enhances motivation to not only graduate from high school, but also to pursue a college education.

4. New Student Week

Retention is enhanced by programs that help students from day one, such as this week-long orientation program before fall classes start. This week offers a wide variety of sessions to help new students manage their transition from high school to university life, understand academic expectations, and better understand and cope with social challenges (e.g., roommates).

5. Serving Military Veterans - WOU was named a **"Military Friendly School"** by Victory Media for being a supportive environment. A staffed veterans' resource center will open Spring 2014.

⁶ TRIO SSS Award Announcement FY 2012: <http://www2.ed.gov/programs/triostudsupp/awards.html>. For FY 2013-14, the Department of Education reduced grant money awarded and the number of students funded by 5.2% for all TRIO-SSS Programs. The reduction is reflected in the numbers above.

⁷ WOU internal Fall fourth week data.

D. Accreditation at WOU

- Northwest Commission on Colleges and Universities (NWCCU)
- National Council for Accreditation of Teacher Education (NCATE)
- Teacher Standards and Practices Commission – State of Oregon (TSPC)
- Council on Rehabilitation Education (CORE)
- National Association of Schools of Music (NASM)- WOU Department of Music
- Commission on Collegiate Interpreter Education- (CCIE)

WOU has one of only seven accredited U.S. programs in American Sign Language/English interpreting.

E. Financial performance: fund balance as a % of operating revenue

WOU sets a higher goal for fund balance as a percent of operating revenue (between 10%-20% with a target of 15%) than other Oregon public universities because of the increased financial risk associated with the WOU Tuition Promise⁸. Even with a higher goal, WOU has demonstrated one of the strongest fiscal positions within the OUS system over the last two years and is projected to maintain this through the current fiscal year (Table 1).

Table 1. Fund Balance as a % of Operating Revenue

	June 30,2012 Actual	June 30, 2013 Actual	Projected for June 30, 2014 as of 9/30/13
WOU	19.3%	16.6%	16.5%
PSU	18.9%	12.6%	8.5%
UO	15.6%	14.7%	16.4%
OIT	16.2%	15.7%	10.9%
OSU	11.2%	8.6%	8.6%
EOU	7.8%	1.6%	-1.9%
SOU	8.1%	2.1%	2.0%

Source: OUS Quarterly Management Report

This success is due to a comprehensive approach to fiscal management demonstrated in multiple initiatives. For example, WOU leadership started the “Window of Opportunity” continuous-improvement initiative three years ago to inform the campus community about fiscal challenges and to

⁸ The WOU Tuition Promise guarantees newly enrolled undergraduate freshmen the same tuition rate for four years. **(Students who enrolled in the fall of 2008 on this plan now have the lowest tuition in the OUS.)** WOU currently offers students the choice of the Tuition Promise with a higher starting cost that doesn’t change, or a traditional tuition price structure which may increase from year to year.

engage departments in improving efficiency and identifying resource opportunities. This initiative has had a significant impact on improving WOU’s financial position.

Strong fiscal oversight is also demonstrated in conservative cash management practices and policies (e.g., those related to purchasing, loans for capital projects, accounts payable and accounts receivables), budget management within each budget organization level, or personnel management (e.g., assessing a vacant position before it is filled).

Ultimately, WOU must manage its finances carefully because of the nature of who we serve. Our student population is predominately Oregon residents in undergraduate programs; thus, we don’t receive the larger tuition margin that is earned when an institution has a higher percentage of non-resident, graduate, or international students who pay a higher tuition rate. Additionally, Oregon residents attending WOU are more likely to have significant economic challenges to attending college (see pages 11-13); raising tuition rates must be a choice of last resort.

WOU’s mission of both academic and financial sustainability is evident. Last year, **WOU granted more degrees, with the least state funding per degree**, than any other technical or regional university (Table 2).

Table 2. State Appropriations per Degree at the TRUs – for Academic Year 2012-2013

	WOU	SOU	EOU	OIT
Undergraduate Degrees	1036	773	673	597
Graduate Degrees	220	215	91	9
Total Degrees¹ for 2012-13	1256	988	764	606
State Appropriations ² -in thousands	\$14,132	\$13,436	\$13,851	\$16,613
State Appropriations per Degree	\$11,252	\$13,599	\$18,130	\$27,414

Sources: 1- OUS Degree History data file. 2- OUS 2013 Annual Financial Report, pgs 54-55.

Conclusion: WOU’s financial strength and success is a result of managing the institution well overall, not just increasing student headcount, nor raising tuition – especially when predominately serving Oregonians.

Section Two- WOU Serves Oregon

A. WOU’s students are predominately Oregon residents

WOU has the **highest percentage** of Oregon residents in the total student headcount, and **far exceeds** all other schools in terms of percentage of Oregon residents as graduate students (Table 3).

WOU draws more students from Oregon educational institutions (e.g., Oregon high schools, community colleges, OUS institutions or other Oregon colleges) than any other state university (see Appendix A). Our Oregon student population comes from **every county**, including a wide cross-section of rural and urban areas across the state but predominately Marion (26%), Polk (11%), Washington (10%), Multnomah (8%), Clackamas (7%) and Yamhill (6%) counties as well as Lane, Linn and Benton counties⁹.



Parents and future students at WOU Preview Day

Table 3. Percentage of Oregon residents (based on residency, not fee status)

	WOU	EOU	OIT	SOU	OSU +CC	PSU	UO
Undergraduate	80.0%	72.1%	73.7%	71.7%	69.4%	82.6%	55.9%
Graduate	91.6%	85.9%	41.5%	80.6%	54.0%	71.7%	38.3%
Overall - all students	81.7%	73.4%	73.4%	72.6%	63.9%	80.6%	53.2%

Data Source: OUS Gray Book, Fall 2013 Fourth Week, Report ERDD-04, UG (Admit and NonAdmits) divided by Total UG; G (Admit and NonAdmits) divided by Total G; Total students under 'Residency' divided by Total All Students.

⁹ OUS Gray Book, Fall 2013 Fourth Week

B. WOU serves 'first-generation' students

Definitions vary depending on the source, but generally, first-generation students are those whose parents either did not attend or did not complete a four-year degree. These students are **65% less likely** to complete a Bachelor's degree than students whose parents completed college, and **43% less likely** than students whose parents have some college coursework¹⁰. (See Appendix B for illustration.) They are also more likely to come from low-income families, be Hispanic or Black, and be less prepared academically¹¹.

WOU collects data on parents' educational achievement from two separate sources: the self-declared status on the admission application and on the FAFSA form (Free Application for Federal Student Aid) required for consideration for financial aid.

1. At WOU over the last six years (Fall 2008-2013), self-declared first-generation students have averaged 45%, but have represented **as many as 53%** (Fall 2011)¹² of the incoming first-time freshmen cohort at WOU.



2. According to what WOU's Oregon resident-students report on their FAFSA application:

- **53.5% (mothers)** and **55.6% (fathers)** have only high school or less education.
- For those who received a PELL grant, **59.8% (mothers)** and **60.8% (fathers)** have only high school or less education. Therefore, students with higher levels of financial need are more likely to also be a first-generation student.
- In contrast, Census data estimates approximately 36.3% of Oregon individuals 25 years and older have a high school education or less¹³.

Impact on Oregon's 40-40-20 goals: Graduating a first-generation student increases the likelihood that the student's future children are **also more likely to graduate college**; therefore, WOU's efforts each year multiply over future generations.

¹⁰ National Center for Education Statistics, *First Generation Students in Postsecondary Education: A Look at Their College Transcript*.

¹¹ National Center for Education Statistics, Downloaded from <http://nces.ed.gov/ssbr/pages/postsec.asp>

¹² WOU internal Fall fourth week data.

¹³ From "2007-2011 American Community Survey 5-year estimates", downloaded from <http://factfinder2.census.gov/rest/dnldController/deliver?ts=405289733693>. Percentage calculated as sum of less than 9th grade, 9th-12 grade, and high school graduate/equivalency divided by population 25 years and over.

C. WOU serves economically-disadvantaged students

Students who need assistance paying for college must submit the FAFSA form for federal aid, which also determines eligibility for the federal PELL grant program (based on household income, family size, and number of college students in the family); PELL serves students who have the highest need for assistance paying for college.

- Oregon residents accounted for **86.3% of all students** at WOU who filed the FAFSA. ¹⁴
- **62.1% of those Oregon resident-students** at WOU who filed the FAFSA qualified for the PELL grant. ¹⁴
- **42.8%** (357 out of 834 students) of first-time, full-time freshmen in Fall 2013 qualified for the PELL grant. ¹⁴
- **An average of 47%** of eligible undergraduate students over the last three fall terms (2011-2013) received PELL grants at WOU. (Excluded from eligibility are students that are not admitted into a degree program, students pursuing a post-baccalaureate degree, and international students.)
- **34.6%** of Oregon-resident undergraduates at WOU qualified for the Oregon Opportunity Grant for Fall term, 2013, and at a minimum, approximately 62% of these students have either a mother or father who did not progress beyond a high school education. ¹⁵

Conclusion: Students receiving aid at WOU are generally Oregon residents, and a large majority of those students have significant financial need to attend WOU (Table 4).

Table 4. Percent of All Undergraduates Receiving Pell Grants Awards - Fall 2012

WOU	EOU	OIT	SOU	Big 3 Average	OSU +CC	PSU	UO
35.2%	46.1%	35.3%	31.9%	26.4%	27.9%	29.2%	21.6%

Source: OUS Campus Profiles, Oct 2013

Note that ‘all undergraduates’ includes students who may not be eligible to receive PELL grants such as those not admitted into a degree program, those pursuing a post-baccalaureate degree, or international students.

¹⁴ WOU PowerFAIDS financial aid management system. A total of 3797 individuals filed the FAFSA, 3275 were Oregon residents, and 2033 of those residents qualified for the federal PELL grant.

¹⁵ WOU internal data; lower levels of parents’ education may be understated because as many as 14% of applications listed the parents’ education as ‘unknown’ or didn’t respond.

D. WOU excels in serving Oregon residents, especially under-represented minorities

WOU is **the preferred** Oregon university for Oregon’s Hispanic students, and is **avored 2nd** for African American (after PSU) and Native American (after EOU) resident-students (Table 5). Although WOU seeks to increase diversity representation as part of its mission, we currently exceed the other three TRU institutions in the average percentage of Black, Hispanic, and Native American resident-students. WOU’s campus also reflects the diversity found in Oregon overall, although part of the WOU mission is to increase diversity, defined broadly to include social justice attributes as well as race and ethnicity (Table 6).

Table 5. Comparison of Under-represented Minority Resident-students

Western Oregon University is...	Percentage of Oregon Resident-students					
	WOU	Average of other 3 TRUs	Average of UO, OSU, PSU	SOU	EOU	OIT
a. the <i>preferred</i> Oregon university for Oregon’s Hispanic students ¹ .	10.8%	6.6%	8.4%	6.8%	6.5%	6.6%
b. the 2 nd most preferred Oregon university for Oregon’s African American students after PSU (3.15%) ² .	2.8%	1.0%	2.1%	.9%	1.4%	0.6%
c. the 2 nd most preferred Oregon university for Oregon’s Native American students after EOU ² .	2.0%	1.5%	1.1%	1.3%	2.2%	1.1%

Notes: 1) Analysis of OUS Gray Book data from Fall 2013 Fourth Week (ERDD-04). Data includes self-reported Hispanic ethnicity, of any race. 2) Analysis of OUS Gray Book data from Fall 2013 Fourth Week (ERDD-04). Data includes self-reported student race but excludes ‘two or more’ choice since race was indeterminate.

Table 6. Comparison of Oregon and WOU Student Population

2012 Population Estimates	OREGON	WOU
White (a)	88.3%	76.7%
Black or African American (a)	2.0%	2.8%
American Indian and Alaska Native (a)	1.8%	2.0%
Asian (a)	4.0%	2.0%
Native Hawaiian and Other Pacific Islander (a)	0.4%	0.7%
Two or More Races	3.5%	0.4%
Hispanic or Latino (b)	12.2%	10.8%

Source: Downloaded from <http://quickfacts.census.gov/gfd/states/41000.html> (a) Includes persons reporting only one race. (b) Hispanics may be of any race, so also are included in applicable race categories.

WOU has been **nationally recognized** (Education Trust, 2011, Appendix C) for closing the gap between White and Latino students' graduation, as well as between White and under-represented minority students' graduation (Table 7).

Table 7. Achievement Gap (Negative number means minority students are graduating at a higher rate than white)

Data as of 2011	WOU	EOU	SOU	OIT	OSU	PSU	UO
6-Year White Graduation Rate	39.2%	32.9%	34.3%	42.4%	61.2%	38.6%	66.6%
6-Year Latino Graduation Rate	45.5%	15.8%	18.2%	7.7%	58.4%	37.7%	67.0%
6-Year Under-rep. Minority Grad Rate	40.9%	16.0%	22.2%	6.3%	52.6%	32.7%	63.1%
Gap - White to Latino	-6.3%	17.1%	16.1%	34.7%	2.8%	0.9%	-0.4%
Gap - White to Underrep. Minority	-1.7%	16.9%	12.1%	36.1%	8.6%	5.9%	3.5%
Source: The Education Trust, College Results Online - Downloaded from http://www.collegeresults.org . 2011 data is the most recent available at The Education Trust website.							

WOU's Hispanic students consistently achieve higher six-year graduation rates than White, non-Hispanic students (6 out of 8 years, for cohorts 2000-2007)¹⁶. For the Fall 2006 cohort graduating by Fall 2012, WOU had the **second best achievement gap but graduated over four times** the number of Hispanic students as the institution with the highest graduation rate – OIT (Table 8).

Table 8. OUS Achievement Gap – 6-Year Graduation for 2006 Freshmen Cohort

(Negative number under Achievement Gap column means minority students are graduating at a higher rate than white)

	White, Non-Hispanic	Hispanic	# Hispanic Students	Achievement Gap
WOU	44.7%	52.9%	36	-8.2%
EOU	32.0%	35.7%	5	-3.7%
SOU	31.9%	28.6%	10	3.3%
OIT	47.4%	57.1%	8	-9.7%
Average other 3 TRUs	37.1%	40.5%	7.7	-3.4%
OSU	61.7%	52.0%	64	9.7%
PSU	40.0%	44.4%	28	-4.4%
UO	68.9%	53.4%	71	15.5%
Average Big 3	56.9%	49.9%	54.3	6.9%
Source: Table 6, OUS Institutional Research Services - March 14, 2013, Retention of First-Time Freshmen by Ethnic Group, 2006-07 IPEDS Fall Cohort. Excludes Students Transferring within OUS after Initial Enrollment.				

¹⁶ Internal Fall fourth-week data on first-time, full-time freshmen entering in Fall 2011 and Fall 2012. EXCLUDES transfers in from other OUS schools.

Other achievements in serving students include:

- WOU has achieved higher first-year retention rates for students of color than white students (71.8% v. 69.9% respectively for Fall 2012, 69.5% v 67.4% respectively for Fall 2011)¹⁷.
- WOU’s Student Enrichment Program (funded by both WOU and federal TRIO funds) supports 400 students annually, with first-year retention rates surpassing that of the general student population (77.2% v. 67.9% respectively, Fall 2012)¹⁷.
- First-year retention for Oregon residents, entering WOU as freshmen, has been maintained at approximately 70%¹⁷ for the last two years. If transfer students (within OUS) are included, the first year retention rises to 75.1%¹⁸.
- First-year retention for PELL student-recipients at WOU has exceeded that of non-recipients for each of the last five years (Fall 2009- 2013)¹⁷.

Although WOU’s entering freshmen class has lower average GPA and SAT scores than most other Oregon public institutions (see Appendix D), **WOU undergraduates carry approximately the same credit load as comparable students at OSU; they carry more credits** than at any of the other three TRUs (Table 9).

Table 9. Average Credit Load for Admitted Undergraduate Students – Fall 2013

	WOU	EOU	SOU	OIT	UO	OSU	PSU
Freshmen	13.6	12.0	13.0	13.0	14.7	13.5	12.8
Sophomore	13.7	11.4	13.1	12.5	14.4	13.4	11.8
Junior	13.2	10.5	12.6	11.7	14.0	13.0	11.7
Senior	12.5	10.4	11.7	11.0	13.2	12.6	11.3
Fall 2013 Fourth Week Data ERCH-01 Data Average calculated as Total Student Credit Hours / Student Enrollment excluding non-admitted undergraduates.							

¹⁷ Internal Fall fourth-week data on first-time, full-time freshmen entering in Fall 2011 and Fall 2012. EXCLUDES transfers in from other OUS schools; thus, this number is lower than that normally reported by OUS.

¹⁸ 2013 Draft Profile of WOU, prepared by OUS, September 2013.

Section Three – Academic Capacity

Western Oregon University takes an intentional, continuous improvement approach that assures our portfolio of academic programs continues to have contemporary value as the needs of the State of Oregon evolve. Several characteristics of WOU enable us to respond to the changing face of higher education:

- a) Our lean administrative structure, with strong communication across units, increases collaboration among key decision-makers in finding solutions to academic challenges.
- b) Our smaller institutional size facilitates a collaborative culture that enhances the efficiency and effectiveness of faculty governance, including curriculum development and review.
- c) Our commitment to a regional focus enhances our ability and capacity to invest in partnerships (e.g., K-12 school districts, community colleges, or major employers). These partnerships result in successful and relevant undergraduate and graduate programs, specialized certificate programs, enhanced internship or practicum placements, and broader delivery options that fulfill our public service mission.

The following sections summarize ways in which WOU may continue to concurrently improve academic and institutional sustainability.

A. Students

In anticipation of a continued decline in the number of Oregon high school graduates¹⁹, WOU is increasing its efforts to attract non-traditional students who may have entered the workforce, dropped out of college or returned from military service. These individuals may be interested in completing their degree or enrolling for the first time. For example, WOU's new veterans' center will open this spring, staffed by a WOU graduate and recent veteran, who can market WOU's programs through veteran-only channels as well as assist current or potential veteran-students in navigating the academic environment.

WOU also continues to build on its current strengths in attracting students from diverse communities, with a special target of providing access to the increasing population of Latino high school graduates. As part of this strategy, WOU will continue to host the annual César E. Chávez Leadership Conference, which will bring nearly 1,700 high school students to WOU for a day of educational workshops, visits with college representatives, and leadership trainings by nationally recognized speakers. In addition, the WOU University Diversity Committee recently announced competitive grant funding for WOU initiatives that enhance awareness and inclusivity on campus, or increase our ability to attract

¹⁹ Western Interstate Commission for Higher Education (January 2013), "Knocking at the College Door", available at <http://www.wiche.edu/info/knocking-8th/profiles/or.pdf>

students, staff or faculty to WOU from diverse communities—defined more broadly than federally-designated minority populations to include attributes under social justice such as disability or economic hardship.

To increase overall enrollment, we will reach out to new populations of students as well as improve retention by identifying barriers to student success and enhancing services that help students overcome those barriers. In particular, we must continue to address barriers in a differential fashion to effectively serve the needs of a diverse student body (e.g., barriers for a working parent may be different than for a traditional 19 year-old high school graduate). WOU has expanded its tutoring and advising center functions, added evening and online services to reach more students and increased its online and hybrid (blending online with face-to-face interactions) course offerings. We will continue to modify our services for students based upon empirical data and student feedback.

At the end of January 2014, applications to WOU were 10% higher for undergraduate admission and total admitted undergraduate students for Fall 2014 were over 22% higher than for the same time last year (Table 10).

Table 10. Comparison of Undergraduate Applicants and Admitted Students- January ²⁰

	2014	2013	# Difference	% Change	5 year average
UG APPLICANTS					
Resident	1,537	1,306	231	17.69%	1,243
Nonresident	731	771	-40	-5.19%	572
International	40	15	25	166.67%	13
Total Undergrad. Applicants	2,308	2,092	216	10.33%	1,828
ADMITTED STUDENTS					
First time Freshmen	1,516	1,216	300	24.67%	
Transfer	99	97	2	2.06%	
Post Bac	1	2	-1	-50.00%	
Total Undergrad. Admits	1,616	1,315	301	22.89%	1,394
Total Denied	5	1	4	400.00%	
Cancel Rate	0.25%	0.58%			

Academic advising services are crucial to ensure students successfully complete their degree in a timely fashion. Students must be supported as they make critical decisions, particularly when choosing a major and planning necessary coursework. WOU has enhanced student advising so that all students must either meet with a general advisor or their faculty advisor (after declaring a major), but also

²⁰ WOU internal data

provides other advising support to students. For example, WOU provides real-time, online degree tracking that a student may access to track completion of degree requirements as well as perform ‘what if’ analyses if the student changes his/her major. This function, along with in-person and online advising options, enhances students’ decisions and planning.

In response to the call for Oregon high school graduates to complete high school with at least nine units of college credit, WOU has been exploring and piloting multiple collaborations with high schools. WOU has already completed the development of courses in mathematics, literature and writing for delivery in partner school districts, and we are piloting the introduction of dual-enrollment courses in mathematics, English, Spanish, and art in the Hillsboro School District. WOU has also been invited by other school districts to enter into collaborative discussions to create similar opportunities for their students.

B. Academic programs

To maintain WOU’s financial sustainability, we manage costs and proactively assess our overall academic portfolio and allocation of faculty resources. For example, there will always be degree programs that are mission-critical where expenses may at times exceed revenues. However, in order for the institution to be sustainable, we must include in our mix of programs those options that are attractive to potential student-audiences, have a high demand from students, or are aligned with employment trends that receive additional state funding.

To that end, WOU has refined degree programs over the last several years to address contemporary and future needs of Oregon. Further, we have adjusted standard curricular tracks to best address advances in the disciplines (e.g., gerontology, biosciences, environmental, forensic and medicinal chemistry, crime analysis, contemporary music, early childhood education, visual communication arts, digital writing, or geographic information systems). In addition, in response to the need recognized in HB 3093, WOU has introduced applied baccalaureate (AB) degrees in gerontology and psychology, and is preparing to submit AB degree proposals to the State Board of Higher Education in economics, business, computer science and information systems. Other AB degrees are being conceptualized in numerous departments in recognition that the working adult, with an associate of applied science degree or some college credit, may hit a career ceiling because of the lack of a baccalaureate degree. The applied baccalaureate approach will save such students an estimated one-year of class work from what would be required to complete the traditional BA/BS undergraduate degree designed for recent high school graduates.

Finally, WOU will continue its strategic approach to broadening its current online course and program offerings. Constituents in our regional partnerships have expressed interest in a blended approach that reduces the main disadvantage to online course delivery: the loss of educational benefits of face-to-face interactions with faculty. This concept is still in preliminary development, but early indications suggest that demand exists for a wider range of course delivery modalities, including extended programs at satellite locations, evening or weekend courses on campus and technology-enhanced flexible delivery courses.

C. Supporting faculty and teaching

Over the last six months, WOU has restructured to consolidate our division of extended programs, which previously specialized in supporting our online curriculum, with our faculty teaching support center. The center's new director, who has significant flexible-delivery course design experience, was recruited to oversee this combined function. For divisions, the center will support program development, including market analysis to verify demand, and program analysis to validate feasibility. This will help divisions more effectively explore degree program possibilities before engaging in the curriculum review process. The center will also support faculty by emphasizing four areas: use of academic technology, quality in course design, introductions to emerging pedagogies, and a speaker series that highlights other areas of professional development for faculty. Such support will strengthen our work with all students.

Furthermore, WOU's robust technology infrastructure has ample capacity to serve additional students. WOU has been very proactive in leveraging Web 2.0 and open source technologies (e.g., Google Apps and the Moodle learning management system) with just enough customization to work specifically for WOU. For example, WOU's Moodle platform is available to serve faculty's needs in delivering course content not only in online courses but also in hybrid and traditional class settings as well. The support team for Moodle has been increased and strengthened, shortening turn-around time for responding to faculty requests or resolving student problems.

D. WOU's unique resources

1. Teaching Research Institute (TRI)

WOU has the highest sponsored research expenditures of all TRU institutions (\$10.2M in 2011-12), and is **fourth behind OSU, UO, and PSU** in dollars per fulltime faculty (\$50,550 for 2011-12)²¹. Unlike other institutions, TRI does not receive targeted funding provided for institutes and centers through the OUS Resource Allocation Model.

²¹ Oregon University System 2012 Fact Book

The Teaching Research Institute (TRI) houses seven Centers, focused on early childhood special education, deaf-blindness, sensory disabilities, educational assessment, and educational program evaluation. These centers are briefly described with their purpose:

- a. Center on Educator Preparation & Effectiveness (CEPE):** conducts research, provides training and disseminates resources in teaching, educational leadership and proficiency-based strategies.
- b. Center on Inclusion and Early Childhood Care & Education:** provides professional development and technical assistance to practitioners in Early Childhood Education/ Special Education.
- c. Child Development Center:** serves families with children (30 months to 6 years).
- d. Education Evaluation Center:** provides national or state-certified members to conduct comprehensive assessment services for individuals (age 3-adult). The EEC specializes in assessing an individual's disability as well as his or her functional skills, strengths, weaknesses, and capacities.
- e. Evaluation Research Group Office:** provides quality evaluation and research for public and private agencies across the state.
- f. National Center on Deaf-Blindness:** is a national technical assistance and dissemination center for children and youth who are deaf-blind. [The Oregon Deafblind Project](#)²² is a federally-funded project, providing assistance, training, and information to enhance services for children (birth to 21) in Oregon who are deaf-blind. In October 2013, the U.S. Department of Education's Office of Special Education Programs (OSEP) **awarded TRI a five-year, \$10,500,000 grant** to operate the Center.
- g. Technology and Information Management Services:** collaborates with the Oregon Department of Education to provide analysis and reporting for special education information for nearly 200 school districts and has done so for over 20 years.

2. Regional Resource Center on Deafness and Hard of Hearing

The Center prepares professionals to serve the unique communication, rehabilitation, and educational needs of deaf and hard of hearing children and adults, including continuing education opportunities, consultation and community service to enhance the quality of life for citizens who are hard of hearing or deaf.

²² The Oregon DeafBlind Project may be accessed at <http://www.oregondb.org/index.html>

E. Facilities for growth

Western Oregon University estimates that it could expand to serve an additional 2,000 students in face-to-face courses through a combination of existing or already-planned physical facilities. This positions WOU to play a critical role in serving the increased demand required by Oregon's 40-40-20 initiative. Selected examples of facilities that help enable growth are:

- 1. The DeVolder Family Science Center** opened Fall 2013 and houses the Chemistry Department and anatomy-physiology components of the biology program. The facility, designed to achieve the U.S. Green Building Council's Leadership in Energy and Environmental Design (LEED) silver certification, includes approximately 21,000 square feet of new space for science programs. It has six new 1,200 square foot laboratories, as well as ancillary preparation, storage and office space.
- 2. Oregon Military Academy (OMA)** currently occupies a 65,000 square foot, two-story facility. WOU currently uses its classroom space (which can accommodate 8,850 students per month) during the week but the facility also has sleeping and living quarters for about 240 people. The Oregon National Guard will be vacating the building and WOU is interested in repurposing the building for an additional live-learn facility.
- 3. College of Education:** WOU has received a \$17M appropriation to build a 57,000 square foot new College of Education building that will allow WOU to consolidate COE Dean and faculty from four separate buildings on campus and add 16 internet-ready, 'smart-console' classrooms, meeting rooms and research space. This building will serve as one of two demonstration models for Governor Kitzhaber's 2013 Wood Products Executive Order.
- 4. Ackerman Hall:** This state-of-the-art live/learn facility opened in Fall 2010 and has 2,500 square feet of internet-ready 'smart-console' classroom space, residential rooms to accommodate 325 students, and meeting space, was designed and constructed to meet the Leadership in Energy and Environmental Design (LEED) Platinum certification, the highest available, and was the first large-scale, new construction residence hall with that level of certification in the country.
- 5. The Health and Wellness Center** opened Fall 2011, and has a combination of 36,000 square feet in 'smart' classroom space, and 54,000 square feet in an indoor recreational/fitness facility. This facility served 81% of the student headcount in 2011-2012 representing over 177,000 individual visits, and has the capacity to serve an increased headcount with 40-40-20 achievement.

Section Four ~ Financial Forecast

A. Commentary on 10-year financial forecast

1. Summary

WOU's 10-year business plan and financial projections, based on conservative fiscal assumptions, support the state's goal of an educated Oregon citizenry, and most importantly, provide the venue for the continued success of underserved populations to thrive. Our fiscal stability allows Western to invest in meaningful ways to support student success, such as additional significant funds to expand U.S. Dept. of Education federally-funded student service programs or enhance centers that offer hands-on advising in academic skills such as writing or math. Western Oregon University commits to its ongoing continuous improvement initiatives and lean administrative structures. That commitment along with prudent fiscal management practices will allow WOU to meet future challenges and thrive as it educates Oregonians.

2. Conclusion

WOU projects a fund balance between 15%-19% throughout the upcoming ten year period. More importantly, cash on hand (excluding housing, dining, and other auxiliaries) remains at about three months of annual expenditures. Cash balances are particularly important to weather variable state funding levels based on state economic conditions and student enrollment ebbs and flows.

3. Assumptions

The assumptions used in the ten year financial forecast are reasonable and conservative. WOU closely monitors its financial position and as data becomes available over time, WOU management will take appropriate action to respond as needed.

a. Enrollment

WOU, predominantly an institution of Oregonians, projects 1% enrollment growth next year gradually increasing to 1.5% in ten years. This growth assumption is significantly below the growth needed in Oregon to achieve 40/40/20 goals. Additional growth would provide upside potential. The departure of the Oregon Military Academy from the WOU campus provides a cost effective way to increase enrollment capacity at modest cost. The upcoming new college of education (designated by Governor Kitzhaber as a signature wood products facility) will provide innovative and advanced facilities for the next generation of Oregon's teachers. WOU has also just opened a chemistry and physiology laboratory building that serves our future health care workers, nurses, gerontologists, and aspiring medical practitioners.

b. Tuition

Tuition rate increases of between 2% and 3% per year are forecast. Lower amounts may occur if increased state appropriations are provided. The Western Oregon Tuition Promise, in which tuition rates are not increased for four (4) years for students electing this program, will continue. This Promise plan, in effect, provides a mechanism for a fixed cost baccalaureate degree for students and families seeking such an approach.

c. Compensation and benefits

Increases of 3% per year are included but will be bargained biannually under collective bargaining agreements. A 200 basis point increase in pension costs is included to provide for unfunded actuarial liabilities. A 5% annual increase in health care is included but this is also subject to any future structure of new cost effective programs that may provide for more choice and sharing of costs.

d. Inflation on general costs

Generally, a 3% increase annually is provided for inflation in purchased supplies and services.

e. Shared services and governance costs

\$450,000 in annual shared service costs and \$450,000 in annual governance costs is provided for a total of \$900,000 annually.

f. Other assumptions

- Need-based tuition remissions are planned to increase for Oregonians during the period to exceed 13% of total tuition.
- State appropriations are forecast to increase by 3% per year (as per OUS template).
- Total cash on hand at fiscal year-end each year (June 30) is estimated to be approximately \$15-\$21 million, which equates to cash required for roughly 100 days of operating costs.

B. Changes from prior 10-year forecast

- Adjusted for OUS and AGB review comments.
- Elimination of any transfers-in from building use credit funds, generated by grant revenue.
- Elimination of foundation supplemental funds for general fund use.
- Lower enrollment growth and tuition increase rates.
- Higher inflation rates for purchase of supplies and services.
- Increased faculty FTE by 1.0 TT and 1.0 NTT annually.

WOU Financial Forecast

Reflecting comments at UGWG presentation and AGB review.

(\$ in thousands)	Actual	Forecast	Projected	Projected	Projected	Projected	Projected	Projected	Projected	Projected	Projected	Projected
	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	
Number of days operating costs in cash	91	98	96	91	89	87	89	91	94	97	101	
General use cash as a % of total expenditures	25%	27%	26%	25%	24%	24%	24%	25%	26%	27%	28%	
General use cash as a % of total revenues	25%	26%	26%	25%	24%	24%	24%	25%	25%	26%	27%	
Fund balance - historical method	16.6%	17.5%	17.3%	16.2%	15.5%	15.0%	15.4%	15.9%	16.5%	17.5%	18.6%	

WOU - Summary Assumptions

1. Governance and shared service costs are included as shown below.
2. If this bienniums tuition buydown is not extended to future biennia, a one time tuition increase of approximately 3% would be necessary in fiscal 2016, amounting to approximately \$1 million.

(\$ in thousands)	Budgeted	Projected	Projected	Projected	Projected	Projected	Projected	Projected	Projected	Projected	Projected
	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	
Assumptions:											
-Enrollment Growth											
UG Res.	actual	1.0%	1.3%	1.3%	1.3%	1.3%	1.5%	1.5%	1.5%	1.5%	1.5%
WUE	actual	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%
UG Non-Res	actual	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%
Grad Res	actual	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%
Grad Non-Res	actual	1.0%	0.5%	1.0%	1.0%	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%
Tuition Rate											
UG Res.	0.0%	0.1%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%
WUE	0.0%	0.1%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%
UG Non-Res	0.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%
Grad Res	2.0%	2.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%
Grad Non-Res	0.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%
CE credit	0.0%	0.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%
Other	0.0%	0.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%
State appropriations (includes SELP)	per OUS	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%
Salary Increases											
Unclassified - faculty	actual	actual	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%
Unclassified - non-faculty	actual	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%
Unclassified - other	actual	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%
Classified	actual	actual	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%

WOU Financial Forecast

	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23
Retirement composite % (PERS)	21.2%	21.2%	23.2%	23.2%	23.2%	23.2%	23.2%	23.2%	23.2%	23.2%
Health Insurance Rate Increase	actual	5.0%	5.0%	5.0%	5.0%	5.0%	5.0%	5.0%	5.0%	5.0%
S&S increases will be managed to no more than %'s shown		2%	3%	3%	3%	3%	3%	3%	3%	3%
Inflation										
Assumed governance & shared services costs covered by WOU	900	900	900	900	900	900	900	900	900	900

	Actual 2012-13	Budgeted 2013-14	Projected 2014-15	Projected 2015-16	Projected 2016-17	Projected 2017-18	Projected 2018-19	Projected 2019-20	Projected 2020-21	Projected 2021-22	Projected 2022-23
Total Revenues	55,122	57,548	59,455	61,515	63,700	65,961	68,363	70,857	73,447	76,249	79,105
Total Remissions as a % of Oregonian Tuition (assume 90% for Oregonians)				-12.8%	-12.9%	-13.0%	-13.1%	-13.2%	-13.4%	-13.1%	-13.1%
State appropriations (including SELP)	14,111	14,964	16,366	16,857	17,363	17,884	18,420	18,973	19,542	20,128	20,732

Total Costs

Note - a. Actual 12/13 included a one time adjustment of \$2.1 million for change in estimate of allowance for doubtful accounts.
 b. Science building supplemental funding in 12/13 transfer to plant

Total Personal Services	45,120	46,365	48,263	50,503	52,207	53,974	55,826	57,852	59,958	62,147	64,424
Supplies & Services	7,348	7,169	7,312	7,532	7,758	7,990	8,230	8,477	8,731	8,993	9,263
Capital Outlay	504	531	531	531	531	531	531	531	531	531	531
To Plant (b)	725	-	-	-	-	-	-	-	-	-	-
Shared services/governance	2,304	2,438	2,517	2,597	2,681	2,767	2,851	2,938	3,025	3,112	3,199
To Athletics			(250)	(250)	(250)	(250)	(250)	(250)	(250)	(250)	(250)
Org. change											
Total costs	56,001	56,503	59,273	61,813	63,827	65,912	67,754	70,108	72,552	75,090	77,725
12/31/13 forecast adjustment		509	509	509	509	509	509	509	509	509	509
Net	(879)	1,554	691	211	382	557	1,118	1,259	1,404	1,668	1,889

Year end cash balance - general fund	12,485	13,420	13,603	13,305	13,178	13,226	13,836	14,585	15,480	16,640	18,019
Building use credit unrestricted cash	1,437	1,718	1,918	2,118	2,318	2,518	2,718	2,918	3,118	3,318	3,518
total cash available (non auxiliaries)	13,923	15,138	15,521	15,423	15,496	15,744	16,554	17,503	18,598	19,958	21,537

Reflecting comments at UGWG presentation and AGB review.

WOU

Institution Name:
Education and General Fund

Assumptions

	Budget	Projected	Projected	Projected	Projected	Projected	Projected	Projected	Projected	Projected	Projected
	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	

Revenues

Enrollment Growth

UG Res.		1.00%	1.25%	1.25%	1.25%	1.50%	1.50%	1.50%	1.50%	1.50%	1.50%
WUE		1.50%	1.50%	1.50%	1.50%	1.50%	1.50%	1.50%	1.50%	1.50%	1.50%
UG Non-Res		1.50%	1.50%	1.50%	1.50%	1.50%	1.50%	1.50%	1.50%	1.50%	1.50%
Grad Res		1.50%	1.50%	1.50%	1.50%	1.50%	1.50%	1.50%	1.50%	1.50%	1.50%
Grad Non-Res		1.00%	0.50%	1.00%	0.50%	0.50%	0.50%	0.50%	0.50%	0.50%	0.50%

Tuition Rate

UG Res.	0.00%	0.10%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%
WUE	0.00%	0.10%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%
UG Non-Res	0.00%	2.00%	2.00%	2.00%	2.00%	2.00%	2.00%	2.00%	2.00%	2.00%	2.00%
Grad Res	2.00%	2.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%
Grad Non-Res	0.00%	2.00%	2.00%	2.00%	2.00%	2.00%	2.00%	2.00%	2.00%	2.00%	2.00%
CE credit	0.00%	0.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%
Other	0.00%	0.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%

Remissions (% of gross tuition)

	-7.58%	-7.50%	-7.70%	-7.80%	-7.90%	-8.00%	-8.10%	-8.20%	-8.10%	-8.10%
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General Fund - Base Funding
(Includes SELP)

			3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%
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Other

Expenses

Employee FTE

	2.00%	2.00%	2.50%	2.50%	2.50%	2.50%	2.50%	2.50%	2.50%	2.50%
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Unclassified - faculty

Unclassified - non-faculty

Unclassified - other

Classified

	0.00%	0.50%	0.50%	0.50%	0.50%	0.50%	1.00%	1.00%	1.00%	1.00%
	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%

Reflecting comments at UGWG presentation and AGB review.

Assumptions

	Budget	Projected	Projected	Projected	Projected	Projected	Projected	Projected	Projected	Projected
	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23

Salary Increases

Unclassified - faculty		3.4%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%
Unclassified - non-faculty		3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%
Unclassified - other		3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%
Classified		3.3%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%
Student GA		1.0%	0.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%
Student Other		1.0%	0.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%

Benefits

Retirement	21.2%	21.2%	23.2%	23.2%	23.2%	23.2%	23.2%	23.2%	23.2%	23.2%
Health Insurance Rate Increase	0.0%	5.0%	5.0%	5.0%	5.0%	5.0%	5.0%	5.0%	5.0%	5.0%

Services and Supplies

S&S increases will be managed to no more than %s shown

Repairs/maint contracts		2%	3%	3%	3%	3%	3%	3%	3%	3%
Repairs/maint other		2%	3%	3%	3%	3%	3%	3%	3%	3%
Leases		2%	3%	3%	3%	3%	3%	3%	3%	3%
Rents		2%	3%	3%	3%	3%	3%	3%	3%	3%
Utilities		2%	3%	3%	3%	3%	3%	3%	3%	3%
Travel		2%	3%	3%	3%	3%	3%	3%	3%	3%
Debt		2%	3%	3%	3%	3%	3%	3%	3%	3%
Internal reimbursement		2%	3%	3%	3%	3%	3%	3%	3%	3%
Assessments		2%	3%	3%	3%	3%	3%	3%	3%	3%
Non-capital equipment		2%	3%	3%	3%	3%	3%	3%	3%	3%
Subscriptions/books/publ.		2%	3%	3%	3%	3%	3%	3%	3%	3%
Professional services		2%	3%	3%	3%	3%	3%	3%	3%	3%
Other		2%	3%	3%	3%	3%	3%	3%	3%	3%

Reflecting comments at UGWG presentation and ASB review.

WOU 10 Year Financial Projection

	Actual	Actual	Actual	Actual	Actual	Forecast	Projected	Projected	Projected	Projected	Projected	Projected	Projected	Projected	Projected	Projected	Projected
	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25
	6,850	6,182	8,430	11,296	10,031	9,152	10,087	10,269	9,971	9,845	9,893	10,502	11,252	12,147	13,306		
	Actual	Actual	Chg 11	Actual	Actual	Chg 12	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Actual
	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25
Beg. Fund Balance	6,850	6,182	8,430	11,296	10,031	9,152	10,087	10,269	9,971	9,845	9,893	10,502	11,252	12,147	13,306		
Revenues:																	
UG Res.	15,626	17,582	19,994	21,534	21,758	21,246	21,480	22,401	23,361	24,363	25,470	26,628	27,838	29,103	30,426		
WUE	2,918	3,497	4,110	4,529	5,382	6,103	6,201	6,483	6,777	7,085	7,407	7,744	8,096	8,464	8,848		
UG Non-Res	4,137	4,325	4,472	4,265	4,743	5,420	5,611	5,809	6,014	6,227	6,447	6,674	6,910	7,154	7,406		
Grad Res	2,000	2,188	2,027	1,735	1,737	1,774	1,837	1,920	2,007	2,099	2,194	2,294	2,398	2,507	2,621		
Grad Non-Res	303	312	513	552	374	807	831	852	878	900	923	946	969	994	1,019		
CE credit	1,884	2,730	3,543	4,479	5,483	5,144	5,144	5,298	5,457	5,621	5,790	5,963	6,142	6,326	6,516		
Other	1,611	1,871	2,024	1,509	1,864	1,990	1,990	2,050	2,111	2,175	2,240	2,307	2,376	2,447	2,521		
Subtotal Tuition and Fees	28,479	32,505	36,883	38,603	41,291	42,484	43,094	44,813	46,607	48,469	50,470	52,556	54,730	56,995	59,358		
Less: Remissions (as percent of Gross Tuition and Fees)	(2,166)	(2,959)	(3,182)	(2,803)	(3,046)	(3,220)	(3,232)	(3,451)	(3,635)	(3,829)	(4,038)	(4,257)	(4,488)	(4,617)	(4,808)		
Remissions as % tuition /% of OR Tuition (assume 90% for OR > '15)																	
Net Tuition and Fees	26,313	29,546	33,501	35,800	38,245	39,264	39,862	41,363	42,971	44,640	46,432	48,299	50,242	52,379	54,550		
Appropriations (Includes SELP)	19,128	18,779	18,053	13,778	14,111	14,964	16,366	16,857	17,363	17,884	18,420	18,973	19,542	20,128	20,732		
Indirect Cost Recoveries, Grants	776	869	73	365	414	529	500	500	500	500	500	500	500	500	500		
Other	1,320	1,411	1,519	1,950	2,351	2,674	2,727	2,796	2,866	2,937	3,011	3,086	3,163	3,242	3,323		
Transfers-in Aux/Des Ops/Serv				201		0	0	0	0	0	0	0	0	0	0		
Transfers-in Other	35	12	36	200	1	117	0	0	0	0	0	0	0	0	0		
Total Revenues and Transfers-in	47,572	50,617	53,182	52,094	55,122	57,548	59,455	61,515	63,700	65,961	68,363	70,857	73,447	76,249	79,105		
Expenses:																	
Salaries and Wages																	
Unclassified - faculty	13,450	14,039	14,418	15,089	15,480	16,570	17,226	17,832	18,459	19,108	19,779	20,576	21,406	22,268	23,166		
Unclassified - non-faculty	6,473	6,829	7,013	6,836	5,864	5,653	5,823	5,997	6,177	6,363	6,553	6,750	6,952	7,161	7,376		
Unclassified - other	346	335	409	362	491	642	661	681	702	723	744	767	790	813	838		
Classified	6,022	6,039	6,284	6,410	6,474	6,514	6,728	6,929	7,137	7,351	7,572	7,799	8,033	8,274	8,522		
Student GA	106	107	122	133	91	93	94	94	95	96	97	98	99	100	101		
Student Other	1,033	1,012	991	1,033	1,013	1,006	1,016	1,016	1,026	1,036	1,047	1,057	1,068	1,079	1,089		
Subtotal	27,430	28,361	29,237	29,863	29,413	30,478	31,548	32,650	33,596	34,676	35,793	37,047	38,347	39,695	41,092		
Benefits:																	
Retirement (includes aded faculty)	4,936	4,122	4,333	5,759	5,833	6,022	6,453	7,294	7,534	7,782	8,039	8,327	8,626	8,936	9,257		
Health	6,790	7,108	7,816	8,048	7,412	7,472	7,846	8,238	8,650	9,082	9,536	10,013	10,514	11,040	11,592		
Grad asst benefits	182	187	205	211	171	173	176	182	187	193	199	205	211	217	224		
added faculty benefits not above																	
Other	2,183	2,215	2,336	2,387	2,291	2,220	2,220	2,220	2,220	2,220	2,220	2,220	2,220	2,220	2,220		
Subtotal	14,091	13,632	14,690	16,405	15,707	15,887	16,715	17,954	18,611	19,297	20,034	20,805	21,610	22,452	23,332		
Total Personal Services	41,521	41,993	43,927	46,268	45,120	46,365	48,263	50,503	52,207	53,974	55,826	57,852	59,958	62,147	64,424		

Reflecting comments at UGWG presentation and AGB review.

	Actual	Actual	Actual	Actual	Actual	Actual	Forecast	Projected	Projected	Projected	Projected	Projected	Projected	Projected	Projected	Projected	
	2008-09	2009-10	2010-11	Chg 11	Actual	Chg 12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23
Services and Supplies																	
Repairs/maint. contracts	448	310	366	18%	325	-11%	433	473	482	497	512	527	543	559	576	593	611
Repairs/maintenance other	928	704	817	16%	620	-24%	552	764	779	803	827	852	877	903	931	958	987
Leases	108	105	102	-3%	108	6%	107	84	86	88	91	94	96	99	102	105	109
Rents	229	207	151	-27%	179	19%	178	167	170	175	181	186	192	197	203	209	216
Utilities	1,420	1,374	1,404	2%	1,385	-1%	1,241	1,485	1,515	1,560	1,607	1,655	1,705	1,756	1,809	1,863	1,919
Travel	543	579	640	11%	660	3%	634	638	651	670	690	711	732	754	777	800	824
Debt	24	46	222	383%	411	85%	411	411	419	432	445	458	472	486	501	516	531
Internal reimbursement	(4,216)	(4,081)	(3,957)	-3%	(4,421)	12%	(4,561)	(4,710)	(4,804)	(4,948)	(5,097)	(5,250)	(5,407)	(5,569)	(5,736)	(5,909)	(6,086)
Assessments	426	345	346	0%	405	17%	477	558	549	565	582	600	618	636	655	675	695
Non-capital equipment	1,359	1,688	1,490	-12%	1,279	-14%	1,160	972	991	1,021	1,052	1,083	1,116	1,149	1,184	1,219	1,256
Subscriptions/books/publication	186	228	398	75%	412	4%	430	408	416	429	442	455	468	482	497	512	527
Professional services	916	927	1,420	53%	1,024	-28%	1,088	1,149	1,172	1,207	1,243	1,281	1,319	1,359	1,399	1,441	1,485
Change-A/R Allowance-1 time Adj.					2,104		2,104	-	-	-	-	-	-	-	-	-	-
Other	2,390	2,863	2,409	-16%	3,159	31%	3,094	4,790	4,886	5,032	5,183	5,339	5,499	5,664	5,834	6,009	6,189
Subtotal	4,761	5,295	5,808	10%	5,546	-5%	7,348	7,169	7,312	7,532	7,758	7,990	8,230	8,477	8,731	8,993	9,263
Capital Outlay	1,020	1,081	580	-46%	322		504	551	531	531	531	531	531	531	531	531	531
Shared Services One-time costs/savings & Governance							2,304	2,438	2,517	2,597	2,681	2,767	2,851	2,938	3,026	3,114	3,202
S&S, CO, transfers One-time Costs/savings/employee restructuring							725	110	-	-	-	-	-	-	-	-	-
Subtotal	938	0	1	-100%	1,223		3,029	2,548	2,517	2,597	2,681	2,767	2,851	2,938	3,026	3,114	3,202
Transfers-out																	
To Des. Op./Aux.					96		2,304	2,438	2,517	2,597	2,681	2,767	2,851	2,938	3,026	3,114	3,202
To Plant					1,127		725	110	-	-	-	-	-	-	-	-	-
Other																	
Subtotal	938	0	1	-100%	1,223		3,029	2,548	2,517	2,597	2,681	2,767	2,851	2,938	3,026	3,114	3,202
Total Expenses and Transfer-Out	48,240	48,369	50,316	4%	53,359	6%	56,001	56,613	59,273	61,813	63,827	65,912	67,754	70,108	72,552	75,090	77,725
				4.0%			5.0%	1.1%	4.7%	4.3%	3.3%	3.3%	2.8%	3.5%	3.5%	3.5%	3.5%
Net from Operations	(668)	2,248	2,866	27%	(1,265)	-144%	(879)	935	182	(298)	(127)	48	609	750	895	1,159	1,380
Fund Balance at End of Year	6,182	8,430	11,296	10,031	10,031	-11%	9,152	10,087	10,269	9,971	9,845	9,893	10,502	11,252	12,147	13,306	14,686
Fund Balance as % of revenue	13.0%	16.7%	21.2%	19.3%	16.6%	17.5%	16.2%	17.3%	17.3%	16.2%	15.5%	15.0%	15.4%	15.9%	16.5%	17.5%	18.6%
GF - Cash balance					12,485		12,485	13,420	13,603	13,305	13,178	13,226	13,836	14,585	15,480	16,640	18,019
BUC - unrestricted cash					1437		1437	2,018	2,218	2,418	2,618	2,818	3,018	3,218	3,418	3,618	3,818
use BUC cash for maintenance/renovation					-300		-300	-300	-300	-300	-300	-300	-300	-300	-300	-300	-300
net BUC cash					1,137		1,137	1,718	1,918	2,118	2,318	2,518	2,718	2,918	3,118	3,318	3,518
total cash					13,923		13,923	15,138	15,521	15,423	15,496	15,744	16,554	17,503	18,598	19,958	21,537
					91		91	98	96	91	89	87	89	91	94	97	101
number of days of operating costs in cash					25%		25%	27%	26%	25%	24%	24%	24%	25%	26%	27%	28%
General use cash as a % of total expenditures					25%		25%	26%	26%	25%	24%	24%	24%	25%	26%	26%	27%
General use cash as a % of total revenues					25%		25%	26%	26%	25%	24%	24%	24%	25%	26%	26%	27%

Appendix A

Percentage of students from Oregon sources.

	WOU	EOU	OIT	SOU	OSU+ CC	PSU	UO
1. % of <u>new</u> undergraduate admissions coming from Oregon sources. (a)	70.3%	62.3%	63.9%	56.2%	63.4%	63.0%	48.9%
2. % of <u>total</u> undergraduate enrollment coming from Oregon sources (b)	75.5%	55.8%	54.3%	45.7%	66.1%	51.1%	50.6%
<p>Source: (a) OUS Gray Book, Fall 2013, Report ERTE-01-Part 2, for each institution. Calculated as total of New Admits, HS from Oregon sources, and New Admits, College, from Oregon sources divided by the net of Total students less Returning/Continuing. (b) Analysis of data from 2012 OUS Fact Book, 'Undergraduate Enrollment by Educational Source', pg 28. Enrollment sources include total from Oregon high schools, Oregon community colleges, OUS institutions or Oregon colleges divided by total undergraduate enrollment. Calculation does not include students with unknown status, postbac, non-admits, or GED students.</p>							

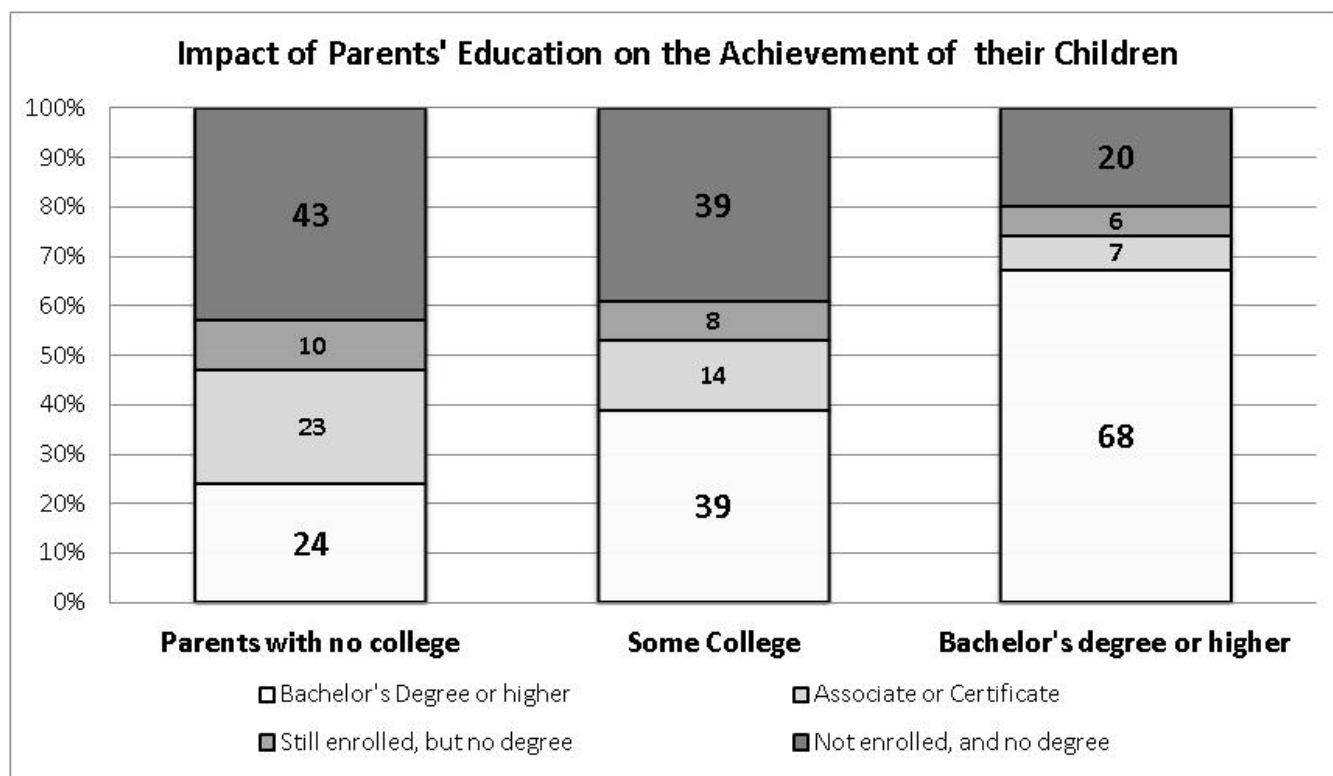


Chart recreated from chart downloaded from National Center for Education Statistics, <http://nces.ed.gov/ssbr/pages/postsec.asp>

Figure included only students for whom complete postsecondary transcripts were available and for whom parents' education was known. Standard error tables are available at [Data Analysis System \(DAS\)](#).

SOURCE: Figure A in U.S. Department of Education, National Center for Education Statistics, *First Generation Students in Postsecondary Education: A Look at Their College Transcripts*, NCES 2005-171, by Xianglei Chen and C. Dennis Carroll.

Published on *Education Trust* (<http://www.edtrust.org>)

Some public colleges and universities are making gains, closing gaps in graduation rates for minority students

 [1]

Data from College Results Online show progress at various institutions throughout the United States

Publication date:

Thursday, January 28, 2010 - 10:10am

WASHINGTON (January 28, 2010) – When choosing a college, many young people often make their decision based on popularity and prestige. What they may not consider is the school’s track record in actually graduating students.

For students of color, this issue is particularly important: Nationally, only about 40 percent of underrepresented minority, or URM, students (African American, Latino, and Native American) earn a bachelor’s degree within six years. The figure for nonminority students is more than 60 percent. But according to two briefs released today by The Education Trust, many institutions of varying types are ensuring that far more young Americans of color earn a degree.

“[Top Gainers \[2\]](#)” and “[Top Gap Closers \[3\]](#)” highlight public institutions nationwide that have made the biggest improvements in these areas. For example, since 2002:

- **Georgia State University**—a research university in downtown Atlanta—boosted its minority graduation rate by 18.4 percentage points. In 2002, only 32.3 percent of minority students graduated in six years. By 2007, that rate had increased to 50.7 percent—which exceeds the school’s non-minority graduation rate of 45.5 percent. The university ranks fifth nationwide in the number of bachelor’s degrees granted to African-American students, according to *Diverse* magazine.
- The **University of Wisconsin-Madison**, a school with a relatively small population of minority students, improved its URM graduation rate by 11.5 percentage points to 60.4 percent. At the same time, their gap between non-URM and URM students narrowed by 8.9 points. In 2007, Wisconsin’s minority students graduated at almost 20 percentage points above the national average.
- The URM graduation rate at rural **Western Oregon University** jumped from 26.3 percent in 2002 to 42.3 percent in 2007. Now, the gap between minority graduation rates and non-minority graduation rates at this public liberal arts college is just 3.1 percentage points.

- **Richard Stockton College of New Jersey**—a suburban campus located near Atlantic City—increased its URM graduation rate by 7.5 percentage points, improving to 58.5 percent in 2007.

“Nationwide, two-thirds of minority students who attend a four-year college attend a public institution,” said Christina Theokas, director of research at The Education Trust and coauthor of the briefs. “Given their mission to serve the higher education needs of their communities and their states, it’s critical for public institutions to not just provide access to these students but also help more of them succeed. The good news is that some are taking that charge seriously.”

Using data from the Integrated Postsecondary Education Data System and [College Results Online \[4\]](#)—a unique Web-based tool that allows the public to view college graduation rates by race, ethnicity, and gender—the studies found that about 60 percent of public four-year colleges have seen improved graduation rates for students of color since 2002. At the same time, 46 percent of these institutions narrowed the graduation-rate gap between minority and nonminority students.

The significant gains made by these schools in boosting minority student success and closing gaps are not just happenstance. The public colleges and universities recognized in these briefs have made success for all students—especially minorities—a primary focus.

At Georgia State, for example, minority students now graduate at rates higher than their nonminority classmates, putting them atop the list of best improvers in each of the two Ed Trust briefs. According to Ron Henry, the school’s former provost and senior vice president for academic affairs, these gains came first and foremost by focusing on data. Henry and his colleagues used data to identify various potholes on the path to a bachelor’s degree for GSU students, from high failure rates in introductory courses to high dropout rates between the sophomore and junior years, when students transition into courses for their majors.

Although GSU took a campuswide approach to improving outcomes for all students, when administrators disaggregated the data, they found that some programs were particularly effective for minority students. For example, first-year learning communities—where faculty members coordinate teaching two or more courses and often serve as advisers to the same group of students—were instrumental in improving retention rates between the freshman and sophomore years by five to six percentage points for all students. But for minority students, these rates rose by ten to 12 percentage points.

“Georgia State’s example demonstrates that public institutions can strive for access and success simultaneously. Institutions should see these as twin goals, not an either-or proposition,” said Jennifer Engle, assistant director of higher education at The Education Trust and coauthor of the briefs. “To reach President Obama’s goal of regaining the global lead in educated adults by 2020, graduating more students—especially from fast-growing minority groups—must be a national priority.”

This work was supported by a grant from Lumina Foundation for Education. The foundation works to ensure that 60 percent of Americans are college-educated by 2025.

Appendix D

FALL 2012 Entering Freshmen	Average High School GPA	Average SAT Math Score	Average SAT Verbal Score
Eastern Oregon University	3.27	473	471
Oregon Institute of Technology	3.46	522	502
Southern Oregon University	3.24	505	514
Western Oregon University	3.20	478	471
Oregon State University	3.57	559	539
Portland State University	3.39	520	523
University of Oregon	3.56	558	548
Oregon University System	3.48	540	530

Letters of Support

WOU Faculty Senate and academic units

Administrative Support Council

Associated Students of Western Oregon University (ASWOU)

WOU Foundation Board of Trustees

Mayor, City of Monmouth



February 26, 2014

Matthew Donegan
President, Oregon State Board of Higher Education
c/o Chancellor's Office
P.O.Box 751
Portland, OR 97207-0751

Mr. Donegan,

The Western Oregon University Faculty Senate unanimously endorses the creation of an independent institutional governance board for Western Oregon University. This consensus has been reached after extensive discussion at the program, department and division levels in both the College of Education and the College of Liberal Arts and Sciences.

As a faculty we are very concerned with maintaining sufficient campus autonomy to continue teaching and mentoring students in a collaborative and supportive environment. We believe that establishing an independent governing board for Western would be in the best interest of our students and of all Oregonians.

Thank you for your consideration.

Sincerely,

Thaddeus Shannon Ph. D.
President, Western Oregon University Faculty Senate
Associate Professor of Theatre



December 13, 2013

Matthew Donegan
President, Oregon State Board of Education
c/o Chancellor's Office
P.O. Box 751
Portland, OR 97207-0751
CC: Mark Weiss, President, Western Oregon University

Mr. Donegan:

The Social Science Division here at Western Oregon University strongly endorses President Weiss's proposal that our school be governed by an independent board.

Social Science faculty here in Monmouth feel this option properly reflects the uniqueness of our context. Like an ecosystem, a good higher education system needs diversity. Western has a stronger commitment to providing a personalized undergraduate academic experience than the larger universities. Our programming, research, and service also differ from those of the other smaller Oregon public universities. We have a deep commitment to the specific context of the mid-valley region, particularly Salem and the various non-university cities of the Willamette Valley. Examples of our distinctive work can be seen in our connections to the valley's Latino community, the Willamette Heritage Center, and the Oregon criminal justice system.

The Social Science faculty want a governing system which recognizes and appreciates our specific nature and purposes and which will advocate for Western Oregon University's distinctive contribution to Oregon. Becoming a branch campus would erode our sense of identity and purpose and in the long run lead to a stripping of our autonomy and resources. Working in alliance with other smaller campuses can be useful politically but administering the disparate situations in Ashland, LeGrande, Klamath Falls, and Monmouth makes better sense schematically than in practice. We are going different places and have different cultures. Western Oregon University does important work and continues to be a vibrant adaptive institution, and deserves the opportunity to develop its unique identity in the public eye. The independent board model makes us more clearly responsible and accountable, but also more likely to create our own public profile.

Western Oregon University has a clear central purpose – to provide Oregon citizens a quality higher education option marked by close student-faculty collaboration and a smaller caring community. The creation of a governing board dedicated specifically to the goals of Western Oregon University will enable us to better provide this unique option to Oregon residents. Thank you for your consideration. Please feel free to contact me if you have any questions.

Sincerely,

Mark Henkels, Ph.D.
Professor, Political Science
Chair, Social Science Division

November 26, 2013

Dear President Weiss,


On behalf of the Administrative Support Council (ASC), I am writing this letter to express our opinion on the three proposed governance options for the University which you have succinctly outlined in campus presentations and on your website. At our meeting on November 14, 2013, we discussed all options. We felt that, in order to continue to best serve our student population and emphasize our strength as a university that serves Oregonians, especially historically underrepresented populations such as first-generation and Hispanic or Latino students, it would be best to pursue independent governance under the new higher education structure.

In our discussion, pursuing affiliation with one of the larger campuses seemed most at odds with our current identity and mission as an institution. Though there is a possibility that a "parent" campus might allow us to maintain relative autonomy as a niche school continuing to serve the needs of underrepresented Oregonians, we felt there was too much uncertainty in this option. WOU may need to completely redirect our focus and mission to meet the new goals of an affiliated larger institution which could radically alter who and how we serve. We also believe unclassified staff (the employees ASC represents) would likely be most at risk in a major restructure of services, as many entry-level and mid-level management positions may be seen as redundant by a larger affiliate.

Entering into a consortium with the other regional public institutions made the most sense to us if the financial stability of those institutions was more certain. However, it seems incredibly risky for WOU to enter into a partnership with two schools (EOU and SOU) that have had highly publicized financial struggles leading to recent proposed retrenchment at each campus. This financial risk at least offset any of the possible benefits of a consortium such as limiting shared services costs and increased legislative lobbying power.

Therefore, our discussion led to the conclusion, more by default than a ringing endorsement, that requesting independent governance would be in the best interest of WOU's students and employees. We felt that the likely increased cost of operations and added compensation for a board of trustees would hopefully be mitigated by continued effective financial planning to keep WOU accessible for the population of Oregonians that we serve.

Sincerely,



David Sundby
ASC President 2013-2014



To Whom it May Concern:

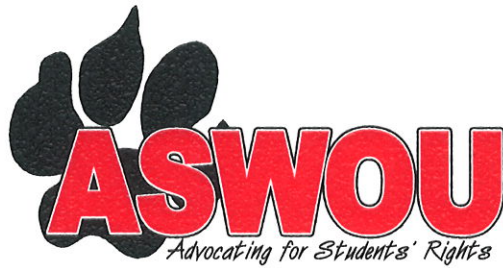
Over the past few months I have had the privilege to represent the student body of Western Oregon University. In this time we have discussed the very important issue of institutional boards. To fully represent the student body I have tirelessly engaged students to see what route would best suit Western Oregon University and help maintain the reason why students come here can be fully persevered in this transition.

One thing I have heard relentlessly during my discussions with students is the opposition towards an affiliated or branch campus model for Western Oregon University. Many students come to Western Oregon University come here specifically for its unique culture. Our specific culture separates itself from those of Portland State University, University of Oregon, and Oregon State University. Our students choose Western Oregon University because they know the faculty, the staff, and the administration all value a personalize education in which is based on small classes taught by esteemed faculty and professional staff that is committed to supporting Western's diverse populations. Having a Mother and her family that did not attend college, I personally appreciate that Western tries serve and help make higher education accessible and put energy into making sure students understand what a college education can do for their future, and helps support them as they make these new leaps.

I love that I have a relationship with my Biology 102 teacher from three years ago. I love that I have a solid and personal relationship with my advisor to the point where I can ask my advisor for professional and academic advice that is specific to what he believes my personal strengths and weaknesses are. I love that this is not a unique experience to me, but students express the same type of relationship with many faculty members around this institution.

In speaking to students who have transferred from UO, OSU, and PSU and they cannot fathom what Western Oregon University would turn into with it being governed by another institution that does not understand the true uniqueness of what are institution represents and contributes to higher education in Oregon. These students have expressed that they leave larger institutions for a reason, and that is because it was not able to fit their needs as student.

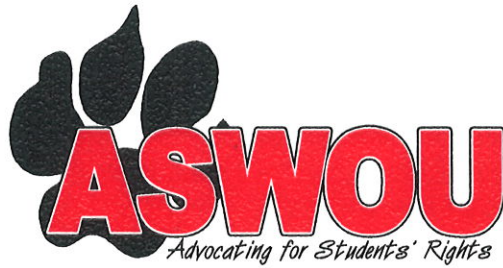
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I would recommend that Western Oregon University is given its own institutional board. The student consensus has been that an individual board would be the best way to allow Western Oregon to fully serve the student population. As well as, ensure that in future years Western Oregon University would allow for students across the state to have an option unlike any other institution within Oregon.

Thank you,

Travis Meuwissen
Student Body President



President Weiss,

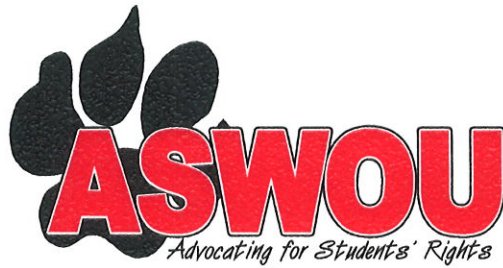
As a student leader here at Western Oregon University, it has been my privilege to speak with several students on the subject of governance and the many changes which will be impacting our futures as students over the coming years. I have spoken to students about not only the anticipated pros of the three options outlined for us at the beginning of the year, but also some of the possible cons to all three of the options. With all of the information within their grasp, students started voicing their opinions and resoundingly so.

Within my conversations with students, it became exceedingly clear that the students of Western Oregon University are not happy or comfortable with the thought of becoming an affiliated campus of one of the larger universities. The thought of larger class sizes alone leaves a bad taste in most of our student's mouths, much less the thought of being taught by graduate teaching assistants as opposed to professors. At Western, we pride ourselves on the high caliber of student support within the classroom from our professors. We know that this feature of our university is something that makes us not only unique, but desirable. Several students have noted that they enjoy their professors knowing their name instead of just being a student number in the class. The fact that the professors strive and have the ability to learn the names of their students speaks volumes to the benefit of smaller class sizes. As a personal example, one of my professors knows everyone to the point where he knows who misses his classes and how often without taking role, and can also pass back a test piled up in random order without calling out names. That is something that just could not happen at a larger institution, and the students of Western Oregon University feel that as an affiliated campus, we would lose the support we gain from our stellar faculty.

In addition to class sizes being a concern within the affiliated model of governance, the students of Western Oregon University also have voiced their concern that the high standards we have set for our university services and our support for underserved population success will be a thing of the past if we are absorbed by a larger institution. As a campus, we are able to provide support to underserved populations with several programs, two of which are our Trio programs and our Multicultural Student Services department. These two miraculous programs assist several hundred students every year in overcoming situations which are sometimes overlooked by a larger institution. In the case of the Multicultural Student Services department, they have expanded their mission to not only include students on the Western campus, but they also work with young adults in high school to provide mentorship and support while they earn their high school diplomas. Students at Western fear that, as an affiliated campus, these services, and many others, would become limited, if not altogether dissolved.

The final concern of many students is tuition. When I say final, I in no way mean that this was last on their minds. This was actually one of the biggest concerns voiced by most students, and I believe that this concern echoes the student concern of rising tuition in general. Students at Western Oregon

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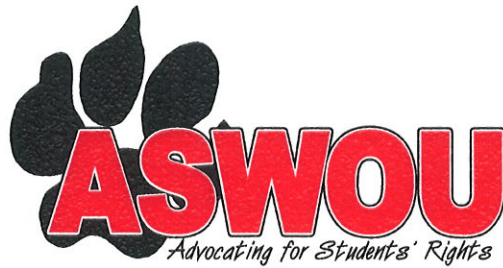
University are highly concerned that within the affiliated model, we would lose the Tuition Promise and the Tuition Choice. Several students I spoke with said that, class sizes aside, if their choice of which university to attend was only being influenced by tuition, the Tuition Promise and the Tuition Choice sealed the deal. These tuition options give us a tremendous amount of security as well as some of the lowest tuition rates in the state. Without these plans, several students voiced that we would be “just another university that raises tuition on us every year.” These plans distinguish us from the rest of the pack and give us a major competitive edge. If that is taken away from us, we will just be “another university,” and that makes Western students uncomfortable and worried for this university that we have all come to know and love. Many of us feel that this place is ours, and that it is a part of us just as much as we are a part of it. Because of the size of our campus, when we as students change, the university changes; and when the university changes, we change right along with it. We are all afraid that a change to an affiliated campus will change us all for the worst, not for the better.

With the previous concerns being voiced by students in hand, I then started to question which model would be preferred of the other two. The students again were clear on what they would do if the choice was theirs alone. As students, we would choose to have Western Oregon University operating under its own Board of Trustees with both faculty and student representation. This plan would ensure the survival of the culture and community we have built here at Western. With this model, Western would be responsible for its own destiny, and could improve upon its services and enhance the features of this campus that we all appreciate and benefit from. Having an independent board allows Western to change when the need arises so that not only the students on campus benefit, but so that the rest of Oregon benefits. By being a smaller university, we appeal to those coming to college who are in need of our smaller class sizes and amazing support services. By being independent, we are better able to help in accomplishing the goal of 40-40-20 because we appeal to a different set of students than the larger universities. An independent board would not only serve those attending Western now, but also those who attend Western in the future.

Thank you for your time, and the consideration of us as students as this topic has been discussed and debated. It means the world to us students to know that we are not the only ones fighting, but that we have the support of the administration and that you are fighting alongside us.

Sincerely,
Jenesa Honda
ASWOU Judicial Administrator

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President Weiss,

I am a transfer student from Oregon State University. During my year there I felt swept under the rug. None of my professors knew who I was and I felt like I was not an important part of the university. My science classes were all taught by individuals interested in research, not the classroom. The obligation to teach was very clear in the professors' nonchalant attitudes and lack of availability to struggling students. Their graduate student assistants ran class and lab, but were only there for a grade and obligation, not because they wanted to teach. All of these things together drove me away from OSU.

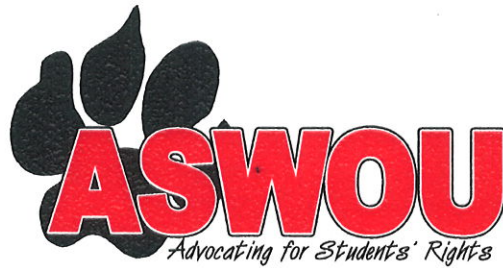
I investigated Western Oregon University because of its smaller size. My friends at WOU expressed how nice the class sizes are and how invested most of the professors are. In my first term here, I can feel the difference from the class sizes and professors. I feel important and appreciated. My classes are small enough that my teachers get to know each student. Smaller classes are extremely important for making first year students, going through the introductory, lower level classes, feel valued and connected to the university. At OSU I did not have that connection which caused my grades struggled, my attendance suffered, and I felt unsupported in my college career.

Furthermore, my professors at WOU are genuinely interested in teaching and helping others learn about topics they are passionate about. The professors' passion helps me care about what they say. It also inspires me to ask questions and go beyond just the surface information presented. When I struggle in a class I trust that I can go to my professors and they will want to help me succeed. While teaching does help solidify knowledge, a graduate student cannot be expected to have that same level of passion for education as a teaching professional.

Becoming an affiliated campus of a larger university would be detrimental to Western Oregon University. The community built around small classes and passionate professors that attracted me and so many other students like me would be lost. A board held at the larger institution would be much more concerned about improving research, expanding opportunities for graduate students in the classroom, and increasing student capacity. Small classes and dedicated teachers, instead of promising researchers, would not be a huge issue for that board. The close knit community that results from these features at WOU are essential to our culture and our success. The stability of a larger institution as a partner is not worth sacrificing the very elements that constitute the foundation of Western Oregon University.

Corbin Garner
ASWOU Director of Business and Finance

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Dear President Weiss,

I came to Western Oregon University after attending a few other colleges. Western feels like home. I came here because of the small class sizes and the America Sign Language program had a very good reputation. I came to Western during a spring term I thought all the leadership opportunities would be filled, I spoke with the student body president and he found a place for me. Other University's do not take the time for students the way Western has for me. This single opportunity has changed who I am. It has given me amazing self esteem and made me ready for the next phase of my life. My husband attends Oregon State University and is the Engineering program. He is very involved but does not have the same support and family atmosphere that Western Oregon University offers. He has said to me often how he wished Western had an engineering program because this place is where he would love to go to school. I feel very blessed to be here at Western and hope that the vision and values of this institution will continue on.

Thank you,

Keri Knight
ASWOU Senator

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February 3, 2014

President Mark Weiss
Western Oregon University
345 North Monmouth Avenue
Monmouth, OR 97361

Reference: Western Oregon University Foundation

Dear President Weiss:

The Western Oregon University Foundation strongly supports the establishment of an institutional board of trustees for the governance of Western Oregon University. The Foundation carefully considered available alternatives, including the possibility of becoming a branch campus of one of the larger universities, or forming a coalition with other technical and regional universities. After doing so, the Foundation believes Western Oregon University and its students will be better served by establishing its independence.

Western Oregon University has by percentage of student body, the highest population of Oregon students, and one of the highest populations of first-generation students of the public universities in Oregon. It serves an increasing number of minority students, including African-American and Latino students. Western Oregon University is able to do so by occupying a distinct position as the only small public university in Western Oregon.

In addition, Western Oregon University has been deliberate and conservative in managing its fiscal affairs, resulting in it being one of few public universities operating in the black. This strong fiscal oversight affords accessibility to an often underserved and diverse population that makes up Western Oregon University's student body.

The alternatives to an independent board put Western Oregon University's current success at risk. Becoming a consortium campus would put undue pressure on its well-managed resources and becoming a branch campus would dilute Western Oregon University's unique, small university alternative character.

The Foundation's mission is to support Western Oregon University in obtaining and managing the resources it needs to continue and expand its success. We believe the best way to achieve this mission is to support the establishment of an independent governance board for Western Oregon University.



President Mark Weiss
February 3, 2014 – Page 2

If the Foundation can be of assistance to the university in this effort, please do not hesitate to contact me.

Very truly yours,

Jim Baumgartner
Foundation Chair

JMB:res
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*Promoting pride,
progress, and friendly
hometown values*

To the Oregon State Board of Higher Education;

As the Mayor of Monmouth I support, and would like to urge approval of, Western Oregon University's request to shift to an independent board-directed form of governance.

In Oregon's new educational landscape, it appears that the smaller Universities are faced with three options: to submit to governance by one of the large Universities; to join in a consortium with their fellow small Universities; or to pursue governance by an independent board.


Were WOU to become a satellite campus of one of the larger institutions, the University would be at risk of losing its success and its unique identity. Despite its smaller size (or perhaps because of it), Western occupies a critical niche in Oregon's educational ecosystem. The larger institutions don't have a focus on the support for first-in-family and Latino students that Western has demonstrated success in offering. The larger institutions, by their nature, can't offer the personal interactions between students and faculty that are hallmarks of WOU's success. The larger institutions, based in larger cities, would lack an understanding of the benefits and challenges of small town and rural life.

When I became Mayor of Monmouth seven years ago, Western faced some challenges. However, prudent financial stewardship by Presidents John Minahan and Mark Weiss has placed Western on an amazingly firm financial footing. It simply would not be in the best interest of the University nor its students for Western to join in a consortium with Eastern and Southern Oregon Universities, given the ongoing financial struggles at both of those institutions.

While being governed by its own, independent board will offer its own set of challenges, such a board is in the best interest of the institution, its faculty, staff and students, and indeed the entire State of Oregon. An independent WOU will be able to continue its attention to underserved populations in the state. An independent WOU will be able to reinvest in programs that benefit Oregonians because of its strong financial position. An independent WOU will be able to continue to thrive and grow in its service to the people of the State of Oregon.

Monmouth was founded in part to create a home for what was to become WOU. The citizens of this city have rallied again and again to support this wonderful center of higher learning, this centerpiece of our community. An independent Western Oregon University will be best suited to continue that role not just in Monmouth, but in Oregon as a whole.

Yours,


John Oberst
Mayor of Monmouth

