

# **Year Seven Peer-Evaluation Report**

## **Oregon State University**

Corvallis, Oregon

April 15-17, 2019

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## Introduction

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Oregon State University (OSU) is a Land Grant institution, founded in 1868, with a mission that includes outreach as well as education and research. In addition, OSU is a Sea Grant, Space Grant, and Sun Grant University, one of only two such universities in the U.S. It has “Very High Research Activity” and “Community Engagement” Carnegie Classifications. OSU includes the original Corvallis campus; the Cascades Campus in Bend; the Ecampus, which delivers online courses and programs; the Hatfield Marine Science Center in Newport; and the Portland Center. Altogether, OSU delivers more than 300 undergraduate, graduate, and professional degree programs to nearly 27,000 full-time equivalent (FTE) students, including about 4,300 FTE graduate students and 900 FTE professional students.

Dr. Edward J. Ray has served as President of OSU since 2003. In March 2019, Dr. Ray announced that he would step down in June 2020, at the conclusion of his current five-year contract. President Ray has had exceptional longevity compared with most other OSU administrators. Since the Year Three Report was submitted in March 2014, OSU has had many significant leadership transitions. Dr. Sabah Randhawa departed in July 2016 and Dr. Edward Feser took up the position of Provost and Executive Vice President in February 2017. New deans include Scott Ashford, College of Engineering; Roy Haggerty, College of Science; Roberta Marinelli, College of Earth, Ocean, and Atmospheric Sciences; Mitzi Montoya, College of Business; Phillip Mote, Vice Provost and Dean of the Graduate School; Javier Nieto, College of Public Health and Human Sciences; Alan Sams, College of Agricultural Sciences; Susan Tornquist, Carlson College of Veterinary Medicine; Anthony Davis (interim dean), College of Forestry; Mark Leid (interim dean), College of Pharmacy; and Toni Doolen, College of Education, while continuing as Dean of the Honors College. This represents turnover of 10 out of the 11 college dean positions. Susan Capalbo, Senior Vice Provost for Faculty Affairs and Accreditation Liaison Officer, is also new to her position since the Year Three Report, as is Lisa Templeton (Associate Provost, Ecampus) and several other senior administrators.

With statutory changes passed in 2013, the State of Oregon began its transition from the Oregon University System. In July 2014 the OSU Board of Trustees assumed responsibility for OSU governance. OSU is now one of seven independent public universities in Oregon. The Oregon Higher Education Coordinating Commission (HECC) was established to coordinate some aspects of the operation of public universities and community colleges, specifically budget requests to the Legislature, the distribution of the State appropriations, and substantial changes in institutional mission.

OSU has had significant enrollment (headcount) growth over the past five years, although the 11% increase was less than the 37% for the preceding five-year period. In recent years, much of the growth has been at the Cascades Campus and Ecampus. Slowing enrollment growth at the Corvallis Campus has led to appropriate OSU consideration of the financial implications, given that support from the State of Oregon is unlikely to increase in the future.

There have been ten major construction projects completed or begun in 2014 or later, including additional classroom, residence hall, and research spaces. These are mainly located on the Corvallis campus, but a major expansion of the Cascades Campus facilities has begun, and a new Marine Studies Building is under construction at the Hatfield Marine Science Center. Recently, OSU has decided to focus construction on the Corvallis campus on renovation and repurposing of existing buildings and is allocating substantial funding to that end.

## Recap of Recent Past Evaluations and Institutional Responses

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OSU last received a comprehensive peer evaluation in spring 2011, and accreditation was reaffirmed in summer 2011 based on that review. OSU submitted a Year One *Mission and Core Themes* report in spring 2012, and a Year Three *Resources and Capacity* report in spring 2014. There were three evaluations during the current accreditation cycle, the normal Year One and Year Three Evaluations, plus an *ad hoc* peer evaluation conducted in fall 2012. Recommendations from the Year One evaluation, concerning a clearer definition of mission fulfillment and improvements to documentation of student learning outcomes assessment, were sufficiently addressed in the *Year Three Resources and Capacity Report*, according to a July 2014 letter from then NWCCU President Sandra Elman. There were two recommendations resulting from the *ad hoc* fall 2012 evaluation, the first urging continued progress in sustaining and enhancing learning assessments of undergraduate and graduate education and the baccalaureate core curriculum, the second recommending that OSU provide evidence that assessment data are used to revise educational programs. The first recommendation was deemed sufficiently addressed in the July 2014 letter from President Elman, but the second recommendation was to be further addressed in an *ad hoc* report in fall 2015. That report was accepted by the Commission in February 2016. While those earlier recommendations were closed based on reports submitted by OSU, they are noted here because some similar concerns and recommendations have arisen during the current review.

There was one recommendation of the peer evaluators of the spring 2014 *Year Three Resources and Capacity Report*, which is addressed in the spring 2019 *Year Seven Self-evaluation Report*:

1. The Committee recommends that Oregon State University further refine its articulation of an acceptable threshold of mission fulfillment. (Standard 1.A.2.)

The *Year Seven Self-evaluation Report* responded to this recommendation. OSU selected 17 “Yardsticks”, which were either one or several of the indicators identified in the *Year Three Resources and Capacity Report*, eight “Yardsticks” for the Undergraduate Education core theme, five for the Research and Graduate Education core theme, and four for the Outreach and Engagement core theme. Many of the “Yardsticks” are also metrics that are tracked to assess progress toward the goals of the institutional strategic plan. For each of the “Yardsticks”, three levels of performance were established: exceeds expectations, meets expectations, and falls below expectations. Thresholds were set based on the performance of other Carnegie Very High Research Activity Land Grant universities when data were available; otherwise they were set based on internal goals for improvement. Although it was not expressly stated, the discussion of mission fulfillment in the report section dealing with Standard Five indicated that mission fulfillment was attained when all “Yardsticks” either met or exceeded expectations.

This is a common and practical approach to defining mission fulfillment, and so the *Year Seven Self-evaluation Report* provides evidence that OSU has refined its articulation of an acceptable threshold. The evaluator committee did have concerns about some of the “Yardsticks” that were chosen. These are discussed under Standard 1.B.2.

## Response to Student Achievement Data

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The evaluator committee assimilated information from the *Year Seven Self-evaluation Report*, site visit interviews and forums, additional provided documentation, and institutional data on web sites as part of the process of synthesizing this report. In addition, NWCCU provided evaluators with data on enrollment, student graduation and retention rates, transfer out rates, and loan default rates. In the context of the provided student achievement data, the committee asked several questions regarding key challenges of the institution related to the institution's graduation rate and other data provided.

### *Challenges affecting graduation rates*

Many challenges were addressed, and the following articulates a non-comprehensive set of challenges. First, students are confronted with academic challenges transitioning to Oregon State University, whether first-time/full-time or transfer students. First-time students are sometimes not prepared for the amount and rigor of course requirements that must be met to be a successful student at Oregon State University and transfer students are also confronted with a similar, but not identical, set of challenges. This academic transition proves very demanding, especially in high-impact, gateway courses.

Second, students are challenged by their transition into the Oregon State University community, because it is culturally different than what they have experienced previously. OSU is a large and complex organization where students must navigate academic and non-academic systems. As the state's Land Grant institution, Oregon State University has a mission responsibility of student access. OSU admits approximately 70% of its applicants and the student body is approximately 70% Oregon residents, in alignment with the goals of access and state-commitment. That context means the student body at Oregon State has a significant population of first-generation students and students from underrepresented populations. OSU is challenged by the needs of these students and the institution needs to be deliberate in the development and implementations of retention support systems.

Third, a significant portion of the student population is challenged by financial issues that reduce their ability to pay for attendance. This challenge is magnified by the composition of the student body, since a significant proportion of the students are from low-income pre-college situations. A significant proportion of students enrolled don't complete their degrees due to financial pressures.

### *Actions taken to improve graduation rates*

The evaluator committee asked several questions regarding actions and initiatives of the institution that were underway to improve graduation rate and the quality of the academic enterprise.<sup>1</sup> Oregon State University has student success initiatives focused on undergraduate and graduate students active across multiple academic, support and administrative units within the university. There are interdisciplinary teams charged with promoting student success and increasing graduation rates, and these initiatives often appear to be managed in a de-centralized manner. An example of this is the Undergraduate

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<sup>1</sup> Evaluator committee members were concerned about an apparent jump in transfer out rate, which increased abruptly from 9% in 2013 to 24% in 2014 -2016 in the data provided by NWCCU. If real, graduation rates would plummet in a few years. Dr. Capalbo has looked into this and believes that there was an OSU data reporting inconsistency and that the increase did not actually occur.



Student Success Initiative, with a steering committee composed of deans, associate deans and vice/associate provosts.

Oregon State University is doing the following to improve graduation rates:

- Working with campus partners, Enrollment Management (Scholarships Office) implemented a centralized Scholarship Management System, where improvements have been made in offer letters, including detail about the type of financial aid offered and earlier transmission to accepted students. This can be achieved because the management system enables connectivity between central admissions, which has some scholarship funds, and the colleges/departments which have additional scholarship funds. Coordinating between central administration and the academic programs allows for stacking of financial aid, which ultimately benefits the students.
- The Undergraduate Student Success Initiative team members have supported efforts to assist students experiencing perilous financial situations. Team members have developed an academic early alert system that includes tracking students who are accruing deficits in their accounts, and they have systematically provided retention grants to some of those students. For nearly completed students who have financial need, they have awarded completion grants. Furthermore, staff from this team have developed lists of students who have completed requirements for degree completion and have not applied for graduation. Those students have been contacted and provided with assistance to progress to graduation. To date, more than 150 students have graduated as a result of this specific intervention.
- Another commitment from Oregon State University has been an overall positive web presence. The strong web presence includes the Registrar's web site, which has many facilitative links for students interested in attending OSU and those already enrolled. This web site also has numerous links beneficial to faculty and advisors who are interested in information as diverse as degree maps, articulation agreements, or classroom scheduling.
- Since the mid-cycle accreditation evaluation, OSU has focused several efforts on the transition of students into their system by providing strong pre-arrival information, bridging admissions and enrollment, improving transition curriculum, onboarding students into the community with a focus on belonging, and enhancing faculty mentoring.
- OSU has improved their policy and procedures for assigning student financial aid and scholarships, with specific interventions before and after students are enrolled in the programs.
- Since the mid-cycle accreditation evaluation, OSU has made progress on modifying the overall curriculum by remodeling the baccalaureate core, redesigning high-impact courses – with historically high rates of D or F grades or Withdrawal (DFW) – using a collaborative model with faculty serving as curriculum change leaders. The faculty work with administration and encourage student input and guidance. In addition, the institution has improved vetting of proposed changes and streamlined the process. As mentioned above, the Undergraduate Student Success Initiative has evaluated high enrollment courses across the University that have high DFW rates. An example of one of these gateway courses is Math 111. There have been improvements in the Math Learning Center that is managed by the Department of Mathematics as well as the Writing Center that serves undergraduate and graduate students and faculty.

- Improvements have been made regarding transfer credits for students onboarding from other higher education institutions. Notably, OSU has posted on their website a comprehensive list of courses that articulate from other institutions and has plans to develop a more automated system for prospective transfer students seeking information on which of their courses articulate.
- Another notable initiative is the cross-campus mentoring program.

*What initiatives appear to be effective in improving graduation rates?*

The Student Success Initiative (undergraduate and graduate) and the Undergraduate Student Success Initiative are both cross-cutting interdomain initiatives that are managed and driven by a combination of academic faculty, academic leaders, staff, and administrative colleagues from the provost's office. Since 2013 OSU has achieved a gradual increase in six-year graduation rates of first-time full-time students, from 61% to 65%.

*What might accreditors do to assist institutions to improve graduation rates?*

One approach is ensuring that the assessment activities, especially student learning outcomes assessment, of the institution result in improvement in the individual courses, degree programs and the overall educational enterprise. While the assessment procedures and policies in place provide a strong platform, additional steps should be taken by OSU to ensure that needed improvements are implemented.

## **Distance Education**

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The evaluator committee obtained information on Ecampus courses and programs from the *Year Seven Self-evaluation Report*, OSU websites, and meetings with Ecampus administrators.

- Evidence supports that all new and existing online courses are subject to the same approval process and assessment processes as face-to-face courses and are similarly required to be consistent with the mission and educational objectives of OSU.
- The committee found that the distance education programs are fully integrated into the planning processes for curricular improvement.
- There is significant evidence that the institution allocates sufficient resources to provide a quality distance education program. Several of the programs are nationally ranked or are included in specialized accreditation.
- Since distance education is fully part of the academic programs of the Corvallis campus, and many of the courses are taught by full-time faculty, the programs are incorporated into the shared governance model of the institution.

- The academic leadership and faculty of OSU academic departments are responsible for the development, delivery and improvement of the courses and programs in distance education, which ensures the rigor of the programs and quality of instruction.
- Distance education courses maintain the same academic standards as face-to-face courses.
- On-campus faculty are the primary developers of the courses and educational programs.
- The institution does evaluate the educational effectiveness of each distance education program as part of student learning outcomes assessment of the entire program. For those programs that are delivered both face-to-face and online, the outcomes data have not yet been disaggregated by mode of delivery. OSU has plans to disaggregate the outcomes in the future.
- Online students have adequate library and information resources readily available to them. Normally, students must take laboratory courses at a campus.
- Online students have access to student services, financial aid, advising, registration and career counseling.
- Advertising of distance education programs is accurate as far as evaluators can ascertain, and includes information about program goals, requirements, calendar and faculty.
- Evidence supports the conclusion that contractual relationships with consortial partners are clear and consistent with the institutions academic mission and objectives.

According to the *Year Seven Self-evaluation Report*, and confirmed by Ecampus staff, online student identity is confirmed at the time of enrollment in the same manner used for students attending class at the Corvallis campus. To get access to Ecampus courses, students must use their OSU Network Identification (ONID) credentials, issued when students first enroll, for authentication. Some courses have exams that must be taken in person, and in that case, a proctor requires photo identification to confirm identity. Some courses have exams that are given online, and those are accessed using the student's ONID. OSU is beginning the process of implementing two-factor authentication. Ecampus is considering other ways of confirming student identity but has not chosen one as yet. At present, Ecampus identity verification procedures are similar to those used by most other institutions of higher education that offer online courses and programs and are also similar to those for OSU face-to-face students that access course materials, submit assignments, and sometimes take examinations via the institutional learning management system.

## **Student Complaint Procedures and Recordkeeping**

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The evaluator requested an account of student complaints received by OSU and provided the Director of Accreditation with a copy of the NWCCU Policy, Record of Student Complaints. In response, the Director supplied a copy of a public report, the 2017-2018 Annual Report, prepared by the Office of Equal Opportunity & Access. That contained two graphs pertaining to students. One graph summarized the complaints received by basis. There were a total of 76 student complaints that year, 13 related to disability, five to gender identity or sex, one to marital status or pregnancy, six to national origin, nine to

race, color, or ethnicity, 20 to sexual harassment, one to sexual orientation, 14 to hostile work environment or other, two to bullying, two to consensual relationships, and one to veteran status. The other graph summarized the approach to Title IX student reports. There were 243 total /Title IX reports received from students, and of these, 22 were investigated, 30 were informally resolved, 36 were addressed through interim measures, and 155 were addressed with resources, only. The Director stated that at Oregon State University, the Office of Equal Opportunity and Access is the only office that processes formal student complaints, which have timelines and requirements for response.

OSU has several other offices that receive informal complaints or appeals. These are easily found using the OSU website search engine. Policy No. 576-022, Student Appeals and Grievances, addresses appeals of academic decisions, including grades and findings of academic dishonesty, financial aid appeals, appeals related to University housing, appeals related to student activities and organizations, appeals of student discipline, and appeals related to student employment. In general, the policy provides a hierarchical list of individuals to whom the appeal or complaint should be submitted, usually beginning with the person who made the decision and ending with the responsible executive; in some cases, student-faculty committees hear appeals. The Office of Audit, Risk and Compliance has an Accountability and Integrity Hotline for reporting wrongdoing or unethical conduct. Students may also contact the University Ombuds Office, which provides conflict management services. That website clearly explains that contacting the Ombuds Office does not constitute a legal notice to the University, and that the University is not obligated to respond to matters brought there.

The evaluator assumes that appeals, which are usually requests for exceptions to policies, are not complaints. According to the Director of Accreditation, OSU does not track all informal student complaints.

## **Assessment of the Self-evaluation Report and Support Materials**

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The Oregon State University *Year Seven Self-evaluation Report* was thorough and well-written, but long, totaling 330 pages, with nearly 200 pages of appendices. While it's expected that a large and complex institution like OSU will need many pages to summarize its self-evaluation, the document was daunting to the evaluators.

The *Year Seven Self-evaluation Report* content was verified and augmented by interviews with administrators, faculty, staff, students, and members of the Board of Trustees, and by examination of relevant institutional websites. All requests for meetings and additional information made by the NWCCU review team were promptly fulfilled. The evaluator committee thanks OSU for facilitating our visit, and particularly thanks President Edward Ray and Provost & Executive Vice President Edward Feser for leadership of the accreditation process and Dr. Susan Capalbo, Senior Vice Provost for Faculty Affairs and Accreditation Liaison Officer, and JoAnne Bunnage, Director of University Accreditation, for leading the preparation of the *Year Seven Self-evaluation Report* and coordinating the site visit. Members of the evaluator committee traveled to the Cascades Campus and the Hatfield Marine Science Center, and staff at both locations were very helpful in facilitating the visits. The evaluators also thank everyone who participated in preparing the documents that we were sent to review or who attended meetings arranged for evaluators at the Corvallis and Cascades campuses and the Hatfield Marine Science Center.

## Eligibility Requirements

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OSU provided evidence of compliance with all NWCCU Eligibility Requirements. Each requirement is addressed briefly below, but when the eligibility requirement is substantially the same as a Standard or Standards, the evidence is evaluated under the Standard to avoid redundancy.

ER2. AUTHORITY: The *Year Seven Self-evaluation Report* did not directly state this, but the information is available on a State of Oregon website. OSU is established as a public university by the State of Oregon [ORS (Oregon Revised Statute) 352.002(2)]. ORS 352.039 broadly describes the goals and mission of public universities, which include “creating an educated citizenry”. Formerly, ORS 351.070(3)(e) explicitly authorized the Oregon State Board of Higher Education to award degrees, but the entirety of ORS 351 was deleted when the Oregon University System was abolished, and the evaluator could find no replacement language in current statute. However, the authority to grant degrees is implicit in OSU’s designation by the Legislature as a public university.

ER3. MISSION AND CORE THEMES: The *Year Seven Self-evaluation Report* did not address Board of Trustees (BOT) approval of the mission and core themes in the specific entry for Eligibility Requirement 3, but the evaluator found evidence of compliance with these requirements in other parts of the *Year Seven Self-evaluation Report* and other accessible documents. The OSU Mission Statement was originally approved by the Board of Higher Education of the Oregon University System in 2004; although the system no longer exists, the Board of Higher Education was the OSU governing board at that time. The current OSU BOT approved the Mission Statement at their second meeting, as documented in the minutes of the March 13, 2014 meeting. The OSU Strategic Plan 4.0 (2019-2023) was approved by the OSU BOT in October 2018. That is documented in the minutes of the BOT October 26, 2018 meeting. The OSU Strategic Plan 3.0 (2014-2018) and the OSU Strategic Plan 2.0 (2009-2013) were implemented before the OSU BOT was appointed, but minutes of the BOT meetings show that it received regular updates on progress relative to Strategic Plan 3.0. The *Year Seven Self-evaluation Report* and the *Year One Self-evaluation Report* do not specifically state that the OSU Board of Trustees or the Oregon University System Board of Higher Education approved the three OSU core themes, which were chosen before the OSU BOT was established. The *Year One Self-evaluation Report* states, “As we approached a revision of our core themes, objectives and indicators following our 2011 comprehensive review, we used the performance compact and mission alignment processes [established by the Oregon University System] to guide this process. Aligning our mission fulfillment efforts for NWCCU with that of the State means we will be collecting data that are meaningful not only to us for our assessment and strategic planning but will also provide clear evidence to the Board and citizens of Oregon of our efforts toward mission fulfillment.” Further, the three OSU core themes are very similar to three of the Strategic Plan 4.0 goals and to the Strategic Plan 3.0 goals, as shown in Table 1 on the following page. As noted above, there is evidence that the OSU BOT formally approved Strategic Plan 4.0 and was well-informed concerning Strategic Plan 3.0.

ER4. OPERATIONAL FOCUS AND INDEPENDENCE: As a public university established by statute, OSU is authorized to operate as an institution of higher education and to take actions consistent with its mission. It is independently governed by a Board of Trustees, as addressed under Standard 2.A.4, and the OSU President has their delegated authority to manage all operations and affairs of the institution, including accreditation.

ER5. NON-DISCRIMINATION: OSU is subject to federal and state laws that prohibit discrimination. OSU policies, published on its website, forbid discrimination in employment or with regard to applicants or students based on age, color, disability, gender identity or expression, genetic information, marital status, national origin, race, religion, sex, sexual orientation, or veteran status.

**Table 1. Comparison of Strategic Plan Goals and Core Themes**

Strategic Plan 4.0 Goal	Strategic Plan 3.0 Goal	Core Theme
Transformative education that is accessible to all learners.	Provide a transformative educational experience for all learners.	1. Undergraduate education.
Preeminence in research, scholarship, and innovation.	Demonstrate leadership in research, scholarship, and creativity while enhancing preeminence in the three signature areas of distinction.	2. Research and graduate education.
Significant and visible impact in Oregon and beyond.	Strengthen impact and reach throughout Oregon and beyond.	3. Outreach and engagement
A culture of belonging, collaboration, and innovation.		

ER6. INSTITUTIONAL INTEGRITY: Evidence of ethics policies is addressed under Standards 2.A.22 and 2.A.23. The evaluators heard no complaints concerning institutional integrity from employees or students.

ER7. GOVERNING BOARD: Evidence is addressed under Standard 2.A.4.

ER8. CHIEF EXECUTIVE OFFICER: Evidence is addressed under Standard 2.A.10.

ER9. ADMINISTRATION: Evidence is addressed under Standard 2.A.9.

ER10. FACULTY: Evidence is addressed under Standards 2.B.4 and 2.B.6.

ER11. EDUCATIONAL PROGRAM: Evidence is addressed under Standard 2.C.1.

ER12. GENERAL EDUCATION AND RELATED INSTRUCTION: Evidence is addressed under Standards 2.C.9 and 2.C.10. OSU does not offer applied associate or undergraduate certificate programs.

ER13. LIBRARY AND INFORMATION RESOURCES: Evidence is addressed under Standard 2.E.1.

ER14. PHYSICAL AND TECHNOLOGICAL INFRASTRUCTURE: Evidence is addressed under Standard 2.G.

ER15. ACADEMIC FREEDOM: Evidence is addressed under Standards 2.A.27, 2.A.28, and 2.A.29.

ER16. ADMISSIONS: Evidence is addressed under Standard 2.A.16.

ER17. PUBLIC INFORMATION: Evidence is addressed under Standard 2.D.5.

ER18. FINANCIAL RESOURCES: Evidence is addressed under Standards 2.F.1 and 2.F.2.

ER19. FINANCIAL ACCOUNTABILITY: Evidence is addressed under Standard 2.F.7.

ER20. DISCLOSURE: To the best of the evaluator committee members' knowledge, they were provided with accurate information in the *Year Seven Self-evaluation Report*, supporting materials, and verbal statements by OSU employees.

ER21. RELATIONSHIP WITH THE ACCREDITATION COMMISSION: The stance of the OSU administration relative to the evaluation and evaluators indicated that they are committed to compliance with NWCCU Policies and Standards.

ER22. STUDENT ACHIEVEMENT: Evidence is addressed under Standards 2.C.1 and 2.C.2.

ER23. INSTITUTIONAL EFFECTIVENESS: Evidence is addressed under Standards 4 and 5.

ER24. SCALE AND SUSTAINABILITY: Evidence is addressed under Standards 2 and 5. In summary, the evaluator committee members consider the evidence strong relative to this requirement.

## **STANDARD ONE – MISSION AND CORE THEMES**

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### **1.A Mission**

1.A.1 The current OSU Board of Trustees approved the Mission Statement at their second meeting, as documented in the minutes of the March 13, 2014 meeting. The Oregon Board of Higher Education first approved the Mission Statement in 2004 and the *Year One Self-evaluation Report* states that the Board of Higher Education also approved it in 2011. The mission statement is widely published. For example, it is in the OSU Catalog, linked from the home page of the BOT, and prominently included in each of the OSU strategic plans. In the opinion of the evaluator, it articulates a purpose appropriate for an institution of higher learning. OSU employees (mainly administrators) asked about the mission statement stated that they understood it and that it helped to guide the institution, particularly its planning efforts.

1.A.2 As discussed in the "Recap of Recent Past Evaluations and Institutional Responses in Self-study" section of this evaluator report, the *Year Seven Self-evaluation Report* included a redefinition of mission fulfillment in response to a recommendation in the Year Three evaluation. OSU selected 17 "Yardsticks", which were either one or several of the indicators identified in the *Year Three Resources and Capacity Report*. These included eight "Yardsticks" for the Undergraduate Education core theme, five for the Research and Graduate Education core theme, and four for the Outreach and Engagement core theme. Many of the "Yardsticks" are also metrics that are tracked to assess progress toward the goals of the institutional strategic plan. For each of the "Yardsticks", three levels of performance were established: exceeds expectations, meets expectations, and falls below expectations. Thresholds were set based on the performance of other Carnegie Very High Research Activity Land Grant universities when data were available; otherwise they were set based on internal goals for improvement. The discussion of mission fulfillment in the *Year Seven Self-evaluation Report* section dealing with Standard Five indicated that mission fulfillment was attained when all "Yardsticks" either met or exceeded expectations.

Several of the “Yardsticks” are metrics that are very commonly used by institutions of higher education, including retention to the second year for first-time, full-time degree-seeking students and the six-year graduation rate for that cohort, the latter disaggregated by certain student characteristics; selected results from the National Survey of Student Engagement; research and development expenditures; and faculty publications. These metrics are not perfect – for example, as defined the retention and graduation rates don’t consider the success of OSU’s large number of transfer students and research and development expenditures do not address the productivity or impact of research – but they are useful because it is relatively easy to obtain comparison data from peer institutions. These “Yardsticks” demonstrate that OSU performs similarly or better than peers, and constitute substantial evidence that OSU is fulfilling its mission to at least an acceptable extent. However, they offer less in terms of demonstrating the excellence that is clearly being achieved in a number of areas.

Other key “Yardsticks” have less substance. For example, the important objective “We maintain quality and assess learning outcomes” has the “Yardstick”, “Percentage of academic program reviews and student learning outcome assessments completed”. The evaluator committee does not consider the completion of a report to be adequate evidence of quality, nor even adequate evidence of sufficient learning outcomes assessment. In general, the evaluator committee thinks that the “Yardsticks” (and the larger set of indicators) have too few measures of end products, completed accomplishments, or impacts outside the university. This issue is addressed further in Section 1.B.2.

## **1.B Core Themes**

1.B.1 OSU identified three core themes:

1. Undergraduate education
2. Research and graduate education
3. Outreach and engagement

In the opinion of the evaluator committee, these core themes both manifest the essential elements of the OSU mission and collectively encompass it. These three core themes are fundamental to Land Grant institutions in general.

1.B.2 For each core theme, evaluators assessed whether OSU has established appropriate objectives for each of its core themes and identified meaningful, assessable, and verifiable indicators of achievement that form the basis for evaluating accomplishment of the objectives of its core themes. The evaluators suggest that the approach to assessment and demonstrating mission fulfillment is simplified for future reporting, so that indicators – reduced in number and assessing predominantly educational outcomes – and the “Yardsticks” used in the definition of mission fulfillment are the same.

### **Core Theme One – Undergraduate Education**

Objective 1.1 is to “Provide broad and continuing access to undergraduate university degrees for the people of Oregon and beyond.” Indicators for this objective reflect the opening of doors and removal of barriers to students’ attainment of bachelor’s degrees. There is an overall a pattern of growth around the key indicators this institution uses to measure success of undergraduate education and students. OSU is becoming increasingly diverse at all campuses and more accessible as exemplified by the growth of the Ecampus and Cascades campus. Evaluators noted a widespread faculty, staff, and administrator commitment to access, which was exemplified in programs, metrics, and attitudes expressed in public



forums. In the case of objective 1.1, the “Yardsticks” and indicators are similar, but as discussed later in this evaluation, many are not indicators of outcomes.

Objective 1.2 is to “Provide rigorous and effective undergraduate degree programs.” Rigor and quality in undergraduate degree programs is reflected and measured in a variety of different ways at OSU, and some of those measures are not included in the set of indicators. For example, colleges that go through national specialized accreditation processes are particularly strong in knowing specific ways their curriculum and programs meet and exceed standards. Many of the OSU colleges have processes for asking alumni and industry about the quality of their graduates and respond to that feedback. The campus wide assessment planning and reporting process addresses quality and rigor in a variety of ways as well. Indicator 1.2.1 is “Percent of active academic undergraduate programs with completed external academic program reviews.” Indicator 1.2.2 is “Percent of undergraduate programs that have full-cycle student learning outcomes assessments” (outcomes defined, student learning assessed, faculty analyzed, curriculum and pedagogy improved, and cycle repeated). This evaluation and assessment are evident as part of regular reviews of curriculum and programs across campus at both course and program levels, as well as the Baccalaureate Core. This work is completed by key staff in the Academic Programs and Assessment Office as well as through Faculty Senate committees like the Baccalaureate Core Committee. It was noted by the evaluators that the Baccalaureate Core assessment review was particularly rigorous and conducted by faculty on the Baccalaureate Core Committee, a Faculty Senate committee.

In the view of the evaluator committee, a major indicator for academic program and quality should be student learning outcomes. However, OSU indicators currently include only the completion of assessment reports; no information on actual student learning outcomes was summarized in the *Year Seven Self-evaluation Report*. Evaluators suggest that in the future, summarized *results* of learning outcomes assessment are included in the indicators.

OSU has made notable progress on student learning outcomes assessment and documentation of the assessment. Faculty design and implement assessment at the course level and departments or colleges design and implement programs to produce strength, sustainability, consistency and quality, all of which are measured in the assessment planning, reporting and feedback processes. Although not every college or department has documented evidence of responding to the Academic Programs and Assessment feedback reports and implementing improvements, 100% of colleges and programs have engaged at some level in the assessment process and there is evidence that training, templates, and timelines have created optimal conditions for widespread engagement in and adoption of assessment as part of the regular course of business. Both the Academic Programs and Assessment office and the Graduate School have designed trainings, workshops and one-on-one consultations to help departments and programs refine their goals, design assessment tools, and report on progress. Although there is still work to be done, the evaluators believe this will play out over the next few years.

**Compliment:** OSU has created a culture of assessment, which is now widely understood and has become a meaningful and valued process for units across campus. The evaluator committee compliments OSU for establishing a strong structure and support for assessment, demonstrating its ongoing commitment.

Indicator 1.2.3 is “Participation rates in experiential learning with a focus on internships, research, service learning and global learning.” There is significant growth over the past five years, with an increase from 69% to 75% of seniors reporting participation. The mission fulfillment “Yardstick” is

participation in research and discovery, rather than participation in all of the indicator activities. For this aspect of experiential learning, rates are increasing significantly and exceed OSU expectations. The Undergraduate Research, Scholarship and the Arts Program plays a key role in this and is to be complimented for the way it engages first- and second-year students in the research mission of the institution and the way it is funded with matching funds from the departments. The evaluator committee encourages OSU to develop indicator(s) in this area that measure effects on student learning outcomes, not just participation.

Indicators 1.2.4, "Satisfaction with value of degree at time of graduation," and 1.2.5, "Percent of graduating seniors reporting immediate plans to work in their field of study or attend graduate school following graduation" have remained constant or dipped slightly since 2013 and were not included as one of the "Yardsticks" indicating mission fulfillment. In the view of evaluators, "satisfaction" is at best an indirect measure of program quality and rigor, and employment or continuing education is affected by additional factors including the U.S. economy. However, the latter indicator is one that greatly interests many prospective students and their families.

Objective 1.3 is to "Provide a supportive and healthy learning environment for student success and leadership development at all levels." As a group, the indicators for objective 1.3 reflect an increased emphasis on personalized service and responsiveness and attention to the needs of transitioning students. Indicator 1.3.1 is "Participation rates in first-year experience courses and retention rate of first-year experience course participants compared to non-participants." Participation has increased from 3,340 to 3,523 and the number of students has jumped from 686 to 932 in a single year. Retention rates for students who engaged in first-year experiences are 86.1%, above the retention of 84.4% for all full-time, first-year students, suggesting that expansion of this program, particularly to include customizable versions (discipline or college based) would further support to goal of increasing retention rates.

For indicator 1.3.2, students who identified two or more university representatives who helped them succeed, there was a twenty percentage point jump, and for indicator 1.3.3, students who indicated two or more campus student support resources that were accessible, there was a ten percentage point jump in a two year time period. Indicator 1.3.4, National Survey of Student Engagement (NSSE) Supportive Campus Environment Benchmark scores are significantly above the national mean and reflect the institution's efforts to remove barriers, support student learning, create inclusive environments, and engage students to completion.

**Compliment:** The evaluator committee compliments OSU for greater attention paid to communicating available resources, helping students know that university representatives are there to help them succeed, and analyzing the connection of participation to retention and completion.

Objective 1.4 is "Use faculty research and scholarship to enrich the undergraduate curriculum." There are five indicators of engagement in enrichment activities (see Table 2 following) that are a part of a "transformative" education, at the heart of OSU's strategic plan all indicate growth and the engagement of faculty and students in this important aspect of student success. There are no "Yardsticks" associated with this objective, and none of the indicators assess either outcomes or effects on student learning.

In summary, OSU's emphasis on the growth of a diverse student population, development of programs that support student success and leadership, and recognition that student learning is dynamic and

depends on both classroom and experiential opportunities is demonstrated in appropriate programs and activities that are producing results. Participation is growing, and faculty, staff, and administrators express strong commitment to diversity and inclusion, student success and improved classroom experiences. This was exemplified in conversations with key OSU constituent groups at every level. Importantly, OSU exceeded its aspirational target for total degrees awarded, and enrollment grew in all modalities and at all levels.

While the evaluator committee was favorably impressed by OSU progress on student success, access, and inclusion, the members think that the assessment of core theme one, Undergraduate Education, should be improved. Table 2 on the following pages summarizes the nature of the “Yardsticks” and indicators for each of the mission fulfillment areas (Table 1.A. 2A of the *Year Seven Self-evaluation Report*) and core theme objectives (pp. 21-28 of the *Year Seven Self-evaluation Report*) for core theme one, Undergraduate Education. In Table 2 each “Yardstick” or indicator is categorized as a measure of whether an assessment process is being carried out, an input into the educational process, a measure of student progress, or an outcome of the educational process. Of the seven “Yardsticks” for this core theme, only three (all based on six-year graduation rates for various student categories) reflect an outcome. Of the other 15 indicators, two concern process, five measure inputs, and eight assess progress. The evaluators suggest that there are just a few fundamental indicators for this core theme, graduation rates (e.g., total standard graduation rate for the six-year cohort and rates disaggregated by diversity categories; graduation rates, total and disaggregated, for groups of students – such as transfer and returning students – omitted from the standard cohort) and student learning outcomes for academic programs and for the Baccalaureate Core. Others can (and probably should) be included, but ideally additions – experiential learning is an example – would be assessed in terms of their impact on learning and/or graduation rates, and not simply in terms of participation. Many of the process, input, and progress measures could be dropped from the lists of indicators or “Yardsticks” for purposes of accreditation reporting, but still used in internal assessment and to inform planning.

## **Core Theme Two – Research and Graduate Education**

Core theme two has three objectives:

- 2.1. Create and maintain a diverse research and scholarship environment that consistently achieves high impacts.
- 2.2. Attract and support high-quality and diverse students for graduate programs.
- 2.3. Provide high-quality training to support graduate students’ degree completion and prepare them for post-graduation opportunities.

For each objective, several indicators are identified. For objective one some of the indicators are: grant and contract expenditures; licensing agreements with industry partners; ratio of tenured/tenure track faculty to the total instructional faculty; and percent of faculty with national or international refereed scholarly publications. For objective two; six indicators are identified: the number of graduate students and historically underrepresented students among them; ratio of doctoral degrees awarded to all degrees awarded; ratio of graduate students supported by assistantships or university fellowships; eight-year graduation rates for all doctoral students and historically underrepresented students; four-year graduation rates for all master’s students and historically underrepresented students; share of grants with funding support provided for graduate students. For objective three, four indicators are identified: percentage of active graduate programs that have completed full-cycle reviews; enrollment in the Graduate Certificate in College and University Teaching program; participant counts in graduate

**Table 2. Core Theme One – Undergraduate Education**

Mission Fulfillment Area	“Yardstick”	“Yardstick” category	Core Theme Objective	Indicators ( <b>Bold</b> are similar or identical to “Yardsticks”)	Indicator category
We retain our students	The retention rate to the second year* for first-time full-time degree-seeking students	Progress	1.1 Provide broad and continuing access to undergraduate university degrees for the people of Oregon and beyond.	<b>1.1.4 First-year retention rates</b>	Progress
We graduate our students	The six-year graduation rate for first-time full-time degree-seeking students	Outcome	1.1 Provide broad and continuing access to undergraduate university degrees for the people of Oregon and beyond.	See next row.	See next row.
Students from all backgrounds succeed	Gaps in [standard FTTF six-year] graduation rates for diverse students	Outcome	1.1 Provide broad and continuing access to undergraduate university degrees for the people of Oregon and beyond.	1.1.1 Applications, admissions and enrollments for all, historically underrepresented, online, OSU Cascades. 1.1.2 % if degree-seeking undergraduates with high college expense to family income ratio <b>1.1.3 Six-year graduation rate: total, historically underrepresented, Pell-eligible.</b>	Input  Progress  <b>Outcome</b>
We prioritize serving Oregon learners.	% if undergraduate degrees awarded to Oregon residents**	Outcome			
We maintain quality and assess learning outcomes.	% of academic program reviews and student learning outcome assessments completed	Process	1.2 Provide rigorous and effective undergraduate degree programs.	<b>1.2.1 Percent of active academic undergraduate programs with completed external academic program reviews</b> <b>1.2.2 Percent of undergraduate programs that have full-cycle student learning outcomes assessments</b> 1.2.3 Participation rates in experiential learning 1.2.4 Satisfaction with value of degree at time of graduation 1.2.5 Percent of graduating seniors with immediate plans to work in their field of study or attend graduate school	<b>Process</b>  <b>Process</b>  Progress  Outcome  Outcome

Mission Fulfillment Area	"Yardstick"	"Yardstick" category	Core Theme Objective	Indicators ( <b>Bold</b> are similar or identical to "Yardsticks")	Indicator category
Our campus environments support student success	Scores on NSSE regarding supportive campus environment	Progress	1.3 Provide a supportive and healthy learning environment for student success and leadership development at all levels.	1.3.1 Participation rates in first-year experience courses and retention rate of first-year experience course participants compared this that of non-participants	Progress
				1.3.2 % of degree-seeking undergraduates who identified two or more university representatives who helped them succeed at OSU.	Progress
				1.3.3 % if degree-seeking undergraduates who indicated two or more campus student support resources that were accessible.	Progress
				<b>1.3.4 NSSE Supportive Campus Environment Benchmarks***</b>	<b>Progress</b>
We integrate research and discovery in the learning experience	Engagement of students in faculty research and discovery	Progress	1.4 Use faculty research and scholarship to enrich the undergraduate curriculum	1.4.1 Number of faculty-led study abroad programs	Input
				1.4.2 Examples of innovative curricula that incorporate faculty research and scholarship	Input
				1.4.3 Examples of faculty research that engages undergraduates	Input
				<b>1.4.4 Participation in undergraduate research</b>	<b>Progress</b>
				1.4.5. Examples of support for undergraduate research	Input

\*The Table 1.A. 2A calls this "first-year" retention, but the evaluator assumes that the standard IPEDS freshman retention definition is used.

\*\*It is not clear whether these are Oregon residents on entry or Oregon residents on graduation. Typically, nonresident students at entry try to establish residency to reduce their tuition cost, unless they are not U.S. citizens or have other barriers.

\*\*\*This indicator is not very clear to evaluators, but it is assumed that OSU performance would be compared with that of peers, and the goal would be to perform equally or better than peers.

student professional development; and examples of resources to support graduate students during their academic careers and beyond. The evaluator comments under core theme one about focusing assessment on outcomes applies here as well. Graduation rates (aggregated and disaggregated) and student learning outcomes (not simply whether student learning outcomes are assessed) are fundamental indicators of achievement for graduate programs.

The mission fulfillment definition for core theme two identifies five goals: 1. Our faculty is research active (measured by ratio of tenured and tenure track faculty to all instructional faculty); 2. Our external research funding profile is strong (measured by the total research and development expenditure); 3. Our research faculty is productive (measured by percentage of faculty with high impact national or international publications); 4. We are training the next generation of scientists and scholars (measured by ratio of doctoral degrees awarded to all degrees awarded); and 5. We maintain quality and assess learning outcomes (measured by percentage of graduate programs in compliance with full cycle review).

Except for one (examples of resources to support graduate students), all of the metrics are assessable and verifiable quantitatively. While mission fulfillment “Yardsticks” for core theme two and indicators for core theme two objectives largely overlap, the separate presentation, the method that determined which indicators were included in the Yardsticks, and reasons for slight differences in wording are unclear. For example, the same category (external research funding is strong) is measured by the “Yardstick” research and development expenditure while the objective two indicator is measured by grant and contract expenditures. (Research and development – R&D – expenditure, at least as defined for the Higher Education Research & Development (HERD) survey that is often used for national comparisons, includes institutional support of research, both direct support and support resulting from under-recovery of facilities and administration costs for sponsored research). Another example is that faculty research productivity is measured by publications in “high impact journals” in “Yardsticks”, but by publication in peer-reviewed journals under the core theme objective two. Not all journals that characterize themselves as peer-reviewed have any noticeable impact on their fields. A common approach for faculty publication data is to use the list of journals indexed by major databases, such as Scopus or the Science Citation Index, because those are often the source of the publication data.

Much more fundamentally, the indicators are mostly not well suited to assessing whether the objectives or the core theme are being achieved. Most of the sub-goals and many of the measures concern the starting point or the process of research, rather than its achievements. Grant awards, research expenditures, and ratio of tenured or tenure track faculty are examples of that. Measures of graduate students’ quality of training and preparation for post-graduation opportunities focus mostly opportunities provided students during their graduate studies, but not their success and impact after their graduation. The evaluator committee suggests indicators focus more strongly on outcomes. That will greatly reduce the number of metrics that need to appear in accreditation reports, as well as appropriately emphasizing achievements.

### **Core Theme Three – Outreach and Engagement**

Core theme three has three objectives which are assessed using 15 indicators of achievement. Objective 3.1 seeks to extend transformational educational experiences to learners, communities and organizations using means beyond traditional classroom-based instruction. OSU identifies five indicators of achievement: Ecampus enrollments and certificates, including demographic breakdown; number of noncredit certificates; participant counts in PACE (Professional and Continuing Education); number of collaborative research projects; and participant counts in youth development programs.

While there are no measures of the diversity within these programs, the indicators represent a diversity of delivery mechanisms for delivering educational content across Oregon and beyond. Additionally, Objective 3.1 seeks to extend educational experiences, so Ecampus and PACE enrollment, participant counts of youth development programs (including Open Campus and Juntos), and counts of collaborative research projects serve as measures of this objective. More telling however, would be outputs such as degrees and certificates earned. In this capacity the indicator, noncredit certificates earned, is an indicator that begins to capture the outcomes of the Objective 3.1 in more impactful ways.

Objective 3.2 seeks to increase collaboration with communities and stakeholders to build and sustain mutually beneficial and reciprocal relationships to advance learning, research, and engagement opportunities. OSU identifies four indicators of achievement: participant and volunteer hour counts for Extension Service program partnerships; amount of external funding for outreach and engagement; Citizen Evaluation of Teaching scores; and research, scholarship and creative activities that provide collaborative opportunities with communities and stakeholders. The indicators of achievement collectively seek to capture a more complex process and set of relationships by measuring community involvement in extension partnerships, quality of extension instruction, and collaborative research.

Objective 3.3 seeks to increase the impact of outreach and engagement activities, economic development and quality of life in Oregon and beyond. OSU identifies six indicators: measures of OSU's economic development and societal impacts; examples of impact of OSU's statewide public services programs; number of global partnerships and agreements; number of students participating in study abroad programs and other international experiences; examples of startup businesses from OSU research and outreach; and examples of use of outreach and engagement in the academic curriculum. This objective admirably aims to push outreach and engagement activities forward. These indicators seek to deepen the institution's understanding of the impact of its outreach and engagement activities. However, it is not clear that they measure activity that supports the objective. Half of the indicators rely on "examples" to represent impact (3.3.2, 3.3.5, 3.3.6). It is not clear what evidence would indicate success on these indicators, if all that is sought are examples. Two indicators rely on the number of global partnerships/agreements and number of students participating in international experiences (3.3.3, 3.3.4). Again, it is not evident how those translate into impact, as the outcomes of those experiences are more likely to inform a measure of impact than mere participation or the existence of agreements. Acknowledging the challenge of doing so, this objective would benefit from a different way of capturing the impact of OSU's outreach and engagement activities.

## Summary

The evaluator committee concentrated on reviewing indicators for core theme one, because it will be a focus of the new accreditation standards. However, the "Yardsticks" and indicators for core themes two and three are also mainly related to processes, inputs, and progress rather than outcomes and impacts. The evaluator committee suggests that meaningful indicators of *achievement* should be mainly indicators of outcomes and impacts. Progress-type indicators are quite useful in monitoring the early effects of improvements, and should be part of ongoing data collection, but are not as meaningful as outcomes and impacts in the assessment of mission fulfillment.

**Recommendation, Standard 1.B.2.** The evaluator committee recommends that Oregon State University identifies indicators of achievement that form a more meaningful basis for evaluating the accomplishment of its objectives.

## **STANDARD TWO – RESOURCES AND CAPACITY**

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### **2.A. Governance**

**2.A.1** OSU has a clear and conventional administrative leadership structure, well documented in organizational charts linked from an Office of the Provost website. The charts are not easy to find from the home pages of most of the major units, but an OSU website search for “organizational charts” returns a web page that compiles all of the charts. Unit websites do consistently include a link to a list of unit administrators and central office staff, and that includes brief descriptions of their roles and responsibilities.

OSU also has a conventional system of shared governance, including a Faculty Senate and the Associated Students of Oregon State University (ASOSU) and Associated Students of Cascades Campus (ASCC). There is one difference compared with other universities, which is that professional staff are classified as faculty at OSU and so they participate in Faculty Senate. The ASOSU President is an ex officio member of the Faculty Senate, as are Provost & Executive Vice President Feser, President Ray, and a number of others. All of the members of Faculty Senate, ASOSU, and ASCC with whom the evaluators spoke indicated that they were given opportunities for input into decisions that affect them. Evaluators also asked about opportunities for input at the open forums, and several of the attendees spoke up to say that they had appropriate opportunities for input into institutional or unit planning, including budget planning. ASOSU and ASCC have funds – from student fees – that they manage, and they have implemented a number of student assistance programs, such as SafeRide, a service “dedicated to providing OSU students a safer ride home or to campus, free from judgment,” and student legal services.

**2.A.2** OSU is no longer part of a system. Public universities in Oregon are still required to cooperate with the Higher Education Coordinating Commission; its limited role is delineated in statute (ORS 350).

**2.A.3** The Office of the Provost, and specifically, the Senior Vice Provost for Faculty Affairs and Accreditation Liaison Officer, is responsible for monitoring compliance with NWCCU Standards, including the impacts of collective bargaining agreements and legislative mandates. The Senior Vice Provost and the Director of Accreditation, who reports to the Senior Vice Provost, provide guidance on accreditation standards throughout OSU.

Evaluator interviews with OSU administrators and OSU websites provided additional information beyond that in the *Year Seven Self-evaluation Report*. The OSU Government Relations Office, consulting as necessary with the General Counsel, is responsible for monitoring proposed legislation affecting the University for any adverse impacts, including conflicts with accreditation policies and standards. Actions by the Oregon State Legislature had a substantial impact on OSU in 2013-2014, when the Legislature permitted OSU to withdraw from the Oregon University System, establish its own Board of Trustees, and take other steps to establish itself as an independent institution. Evidence indicates that this transition was accomplished successfully and in accordance with NWCCU Policies and Standards.

The OSU classified staff, graduate assistants, and, as of June 2018, the OSU non-supervising teaching and research faculty are represented by unions. Existing contracts do not conflict with accreditation standards, and the ALO is responsible for advising OSU negotiators so that this will not occur in the future.



## **Governing Board**

**2.A.4** OSU is governed by a 15-member Board of Trustees (BOT), including the OSU President, who is an *ex officio*, nonvoting member. Other members are appointed by the Governor of the State of Oregon and confirmed by the Legislature. The BOT includes a student (who is a voting member), a faculty member, and a staff member. Board members are subject to Oregon ethics law applying to public officials, and so are required to file an annual statement of economic interest with the Oregon Government Ethics Commission. The BOT itself has a Code of Ethics, which reiterates major provisions of the state ethics law. That Code includes the following, “Trustees must disclose actual and potential conflicts of interest and recuse themselves from the matter at issue...”.

**2.A.5** As delineated in its Bylaws, the OSU Board of Trustees acts only as a committee of the whole, unless the Board has authorized one of its committees to act. A quorum, defined as a majority of the voting and nonvoting members in office, is required to make a decision or to deliberate toward a decision. Members with a declared conflict of interest on the matter under consideration are not counted toward the quorum. Except as provided otherwise in law, the Board may delegate any of its powers and duties; it has delegated authority for operations of OSU to its President, except for authority reserved to the Board. Reserved authority includes the usual items, such as hiring, compensation, evaluation, and removal of the President; certain major financial matters including adoption of the OSU budget; and changes in the mission, purposes, or statutory goals of OSU. It also includes “Mediation with other Oregon public universities regarding a dispute on proposed new program or location.” By reviewing the meeting minutes, the evaluator confirmed that this delegation of authority to the President was most recently amended and approved at the October 26, 2018 Board meeting. The Board has also delegated authority for emergency action between regular meetings to its Executive and Audit Committee, but that authority does not include most of the reserved authority items listed above. In summary, there is evidence that the Board of Trustees Bylaws and Executive and Audit Committee Charter provide for sufficient controls on actions of the Board.

**2.A.6** The Board of Trustees has established Board Principles and Core Values, Bylaws, Charters for its three standing committees – the Executive & Audit Committee, Academic Strategies Committee, and Finance & Administration Committee – and Board Policies and Processes. All of these are posted on its public website. The Board has delegated to the President authority for establishing, reviewing, and revising as necessary most OSU policies. When OSU withdrew from the Oregon University System in 2014, by law the State Board of Higher Education’s Oregon Administrative rules, Internal Management Directives, and other relevant policies continued to apply unless changed. In the interim OSU has readopted many of the pertinent components of these as OSU policies or standards. OSU has developed a comprehensive, web-based Policy and Standards Manual, which can be searched by title, category, or full text. It is engaged in a multi-year, widely collaborative effort to review and revise, add, or delete policies as necessary. This attention to maintaining currency of the policies and standards, and ensuring that legacy policies from the System are fully applicable to OSU, is commendable.

**2.A.7** As described under 2.A.5, the Board of Trustees (BOT) selects and evaluates the President and has delegated authority for operations of OSU to him. The evaluator asked both President Ray and the several BOT members about the evaluation process. Both reported that it was thorough and that it had been useful in focusing the President’s attention on certain specific goals and areas of effort. The evaluation process includes a self-evaluation by the President and the BOT identifying goals for the coming year. For the evaluation completed in October, 2018, these included the “need to remain focused on the financial sustainability of the university, especially given fiscal challenges related to

pension and benefit costs; to work constructively to develop a faculty union contract; and to ensure the degrees granted from the university continue to be of the highest quality.” The evaluation process is more public than most, with both the President’s self-evaluation and a brief statement of the Board evaluation posted on a public website as part of the agenda of the October meeting.

**2.A.8** Its Bylaws require the Board of Trustees to periodically assess its own performance and that of each of its committees and members. The frequency is not specified, but in practice, this evaluation is being done annually. The evaluator discussed the self-evaluation process with several Trustees, who stated that it engaged all of the members and that they felt that it was helpful to the Board. The evaluation process is more public than most, in that the evaluation results are summarized in an attachment to the agenda of the October meeting. In 2018, areas that Board members suggested for improvement were: “spend more time discussing OSU’s strategic direction, critical issues, and future visioning; continue to closely follow university priorities and outcomes and encourage the university to develop plans to meet the critical needs of the future; continue roundtable discussions with students; and tackle ‘head on’ issues that impact students, doing so as part of our university mission.”

### **Leadership and Management**

**2.A.9** OSU employs the usual complement of senior administrators, including President Ray and six Vice Presidents. Provost and Executive Vice President Ed Feser is the chief academic and operating officer of OSU. All of the Vice Presidents and a number of other senior administrators are members of the University Cabinet, which “advises the President on matters related to university-wide initiatives and operations; serves as a venue for shared strategic thinking and collaboration in support of the President’s agenda and initiatives; and provides review of recommendations to the President on matters of broad institutional significance.” The website of the University Cabinet conveniently compiles descriptions of the responsibilities and qualifications of the members; the evaluator reviewed these and found evidence that all of the individuals are well-qualified for their positions by both education and experience. Evaluators met with nearly all of the members of the University Cabinet, and they indicated that they were well aware of their responsibilities for planning, for managing the institution, and for assessing its achievements and effectiveness.

**2.A.10** The OSU President serves as an *ex officio*, nonvoting member of the OSU Board of Trustees and is not its chair. Dr. Edward J. Ray has served as President of OSU since 2003, an unusually long tenure marked by many accomplishments, including highly successful fundraising and substantial growth in both enrollment and research. When hired he was very well-qualified, having served as a faculty member, associate provost, senior vice provost and chief information officer, and executive vice president and provost at the Ohio State University. Dr. Ray has announced plans to retire in June 2020, and the Board of Trustees has begun the process of finding a new president. The evaluator notes that they are taking steps to provide for broad input and ensure that a well-qualified individual is selected: “In late April and early May, the Board of Trustees will host listening sessions and launch a survey to gather input regarding the university’s anticipated needs over the next 10 years and the background, skills and experience needed by OSU’s next president. We will use this important feedback to establish a leadership profile for the position of president in our recruitment of candidates and decision-making process.”

**2.A.11** In addition to the University Cabinet, other leadership groups that foster collaboration across institutional functions include the Provost’s Senior Leadership Team – which includes the vice provosts, several directors including the Director of Budget and Fiscal Planning, and the Vice President for Oregon

State University-Cascades – and the Provost’s Council of Deans. The evaluator reviewed brief biographies of these executives that are posted on University websites and found evidence that all of the individuals are well-qualified for their positions by both education and experience. Evaluators met with most of the members of these two leadership groups, and they indicated that they were fully cognizant of their responsibilities to lead their units in helping to accomplish OSU’s core theme objectives and ensure fulfillment of OSU’s mission.

## **Policies and Procedures**

### *Academics*

**2.A.12** Academic policies are communicated to students through the OSU Catalog and the website of the OSU registrar. An evaluator reviewed that portion of the Catalog (“Academic Regulations”) and the Registrar’s website (“Registration Information Handbook 2018–2019”) and found that the normal range of academic policies was thoroughly addressed. OSU’s new student orientation addresses some of the most important rules. In addition to the information provided in the self-evaluation report, the evaluator reviewed websites and found that the IRB (Institutional Research Board) office is proactive, hosting “student hours” for OSU students with questions or concerns about the IRB process. The OSU Office of Research Integrity website has a link to online training on Responsible Conduct of Research (Collaborative Institutional Training Initiative [CITI]) and other resources, for both faculty and students. OSU offers at least one related general graduate level course, GRAD 520 Responsible Conduct of Research, as well as discipline-based courses on research ethics and compliance.

The *Year Seven Self-evaluation Report* states that new tenure-track faculty are invited to an orientation to familiarize them with promotion and tenure guidelines in research, teaching, and services, and faculty may also attend college, school, or department-level orientations. In addition, the Research Office offers an annual orientation. OSU has a comprehensive *Faculty Handbook*, available online. This includes a Statement of Faculty Responsibilities that appropriately addresses teaching, scholarship, and service as a member of the University community.

**2.A.13** The policies regarding access to and use of library and information resources are readily available via a page and links on the Libraries’ website. A two-year review and update cycle is followed. Enforcement of library access policies is done via OSU ID cards. Policies for the affiliated libraries either follow those of Valley Library (Marilyn Potts Guin Library and the McDowell Veterinary Medicine Library) or use Valley’s policies and revise them for local circumstances (OSU-Cascades).

**2.A.14** Transfer-of-credit policies are published in the Academic Regulations section of the Catalog, specifically Academic Regulations 2 and 3. Academic Regulation 25 specifies certain limitations on transfer credits applied to baccalaureate degree requirements. In the assessment of the evaluator, these policies are sufficient to ensure OSU program integrity, while facilitating mobility of students between institutions to an extent typical of peer universities. Several students attending the student forum indicated that the information on transfer course equivalencies and articulation agreements on the OSU admissions website had been very useful to them in planning their course of study at a prior institution.

## *Students*

**2.A.15** OSU has clearly articulated policies that govern the academic honesty, appeals, grievances, and accommodations for persons with disabilities; all of these are available on OSU websites. Academic Regulation 15, within the Academic Regulations section of the Catalog, addresses academic misconduct. Policy No. 576-022, Student Appeals and Grievances, addresses appeals of academic decisions, including grades and findings of academic dishonesty; financial aid appeals; appeals related to University housing; appeals related to student activities and organizations; appeals of student discipline; and appeals related to student employment. OSU has an extensive *Code of Student Conduct*, accessible through the Office of Student Life website, that addresses prohibited conduct, the disciplinary process, and penalties in detail. The *Disability Access Services Handbook* covers the process of seeking accommodations for individuals with disabilities and is notably comprehensive. A search of the OSU website for “disability” returns the office of Disability Access Services as the first link, and their homepage is helpful and informative. Evaluators heard no complaints concerning the administration of academic honesty, appeals, grievances, and accommodations policies.

**2.A.16** The university has clear and consistent policies that govern the admission and placement of incoming freshmen, transfers, international, graduate, and professional students as evidenced by Exhibits 2.A.16 in the *Year Seven Self-evaluation Report* and the information contained on the websites referenced therein. OSU Office of Admissions uses the Insight Resume Tool is an additional measure to gauge a student’s preparedness for higher education. Using this tool, students explain why they believe they are ready for college. Their responses inform the university of the students’ potential to succeed in higher education, beyond GPA and test scores. Further, the university is provided with an improved understanding of the student and can then develop a clear support plan for that student.

**2.A.17** The university maintains clear policies and provides extensive opportunities for student involvement in co-curricular activities. The evidence is summarized in Exhibit 2.A.17 of the *Year Seven Self-evaluation Report*. The Division of Student Affairs oversees co-curricular activities, including student government, the Orange Media Network, recreational sports, and student clubs, among others. The Student Code of Conduct holds student organizations responsible for collective misconduct in violation of the Code, and there is a comprehensive *Student Organization Recognition Policy (SOR) Manual* (not mentioned in the *Year Seven Self-evaluation Report*) located on the Finance and Administration, Administrative Policies & Procedures Manuals website. The Bylaws of the Orange Media Network Advisory Board make a very strong statement concerning the editorial independence of student media.

There are separate student government organizations, with separate Constitutions, for Cascades Campus and the main campus. A different activities fee is charged to students on the two campuses and there are fewer activities at the Cascades Campus due to its much smaller student body.

## *Human Resources*

**2.A.18** Many human resources policies are included in the OSU *University Policies & Standards Manual* and policies and procedures for faculty, staff, and student employees are addressed in materials posted at the Finance and Administration, Administrative Policies & Procedures Manuals, Human Resources website. That website states that the staff manual is currently under development, although it appears to be substantially complete. The faculty manual was last updated in 2014, according to the revision history included therein.

**2.A.19** OSU Human Resources publishes policies, procedures and manuals that address conditions of employment, work assignment, and rights and responsibilities as listed in Exhibits 2.A.19 of the Self-evaluation Report. Also, see Standard 2.A.18 above. Some of these matters are addressed in union contracts. OSU classified staff and graduate assistants are each represented by unions. The staff union, Service Employees International Union, includes members from other Oregon public universities and current statute requires OSU and other universities to collaborate in a systemwide negotiation at least until 2019. In June 2018 United Academics OSU was certified as representing the non-supervising teaching and research faculty, which were previously not represented. The OSU administration and United Academics OSU are currently bargaining.

None of the attendees at faculty and staff forums expressed concerns about the evaluation process or Human Resources policies and procedures, with one exception noted under Standard 2.B.5. of this evaluation. Classified staff and professional faculty indicated that there were opportunities for professional development, including a tuition discount, but that for most there were no clear opportunities for promotion in their current positions or units. Criteria and processes for promotion of academic faculty are clear and described in the *Faculty Handbook*.

**2.A.20** Data security is a central IT function. OSU Human Resources holds the support of the software locally, but IT ensures security of data at the enterprise level. Confidentiality of personnel records is reportedly addressed in the OSU Policy on Personnel Records, and policies on security are included in the Data Management Policy. However, the evaluator found that the links to “Faculty Records and Confidentiality (OSU)” and “OAR 576-003-0000 to-003-0120” within the faculty and staff manuals were broken. The Office of Faculty Affairs website includes “Faculty records, confidentiality and periodic review”, which clearly delineates the public and confidential parts of faculty personnel records.

### *Institutional Integrity*

**2.A.21** Evaluators visited a large number of OSU webpages in the course of their review and nearly always found the information to be clear, accurate, and consistent, as well as notably easy to locate in most instances. The *Year Seven Self-evaluation Report* did not mention any specific policies on accuracy of communications. However, the evaluator found that the Oregon State University Code of Ethics includes: “Honesty and Integrity – We demonstrate honesty in our communication and conduct while managing ourselves with integrity...” That appears to be a sufficient policy statement relative to forbidding intentionally false communication. It is very difficult to completely assure clarity, consistency, and accuracy of all communications, now that mass communication is available to almost anyone and websites, e-mails, tweets, and other communications can be generated by many university employees at all levels. There don’t appear to be any OSU policies that expressly require due diligence and specifically assign responsibility for avoiding accidental miscommunications, and OSU might consider adopting some, particularly for important communications to students and prospective students. The *Year Seven Self-evaluation Report* statement that “Updates to program websites are the responsibility of the program or unit...” is somewhat vague and does not appear to be grounded in policy. Some institutions of higher education have made it the express responsibility of deans or department chairs to exercise due diligence to assure accuracy and timely updates to college and department websites and catalog entries.

The OSU Catalog is the centrally maintained resource for information on academic programs. Each baccalaureate program nominally has a three-part description, including Overview, Requirements, and Sample Plan. The Overview often includes a statement about expected learning outcomes, but these

are variable in format and level of detail and aren't always identical to the learning outcomes on program websites. Requirements provides the conventional catalog listing of course and other requirements for the degree, and Sample Plan shows how the baccalaureate degree can be completed in four years by completing specific courses in fall and spring semesters of each year. However, the evaluator found that some degree programs had Overviews that did not include learning outcomes (or occasionally, lacked an Overview), and many did not have a Sample Plan. Note that the Sample Plan appears to be the way in which OSU demonstrates that its programs can be completed in a timely fashion, which makes its inclusion important. The evaluator suggests that the Catalog be improved by providing both student learning outcomes and a Sample Plan, consistently, for every program.

**2.A.22** As noted above, OSU has a Code of Ethics that required high ethical standards in general terms. In addition, there are also a number of more specific OSU ethics policies addressing areas such as student conduct; procurement and contracts; fraud, waste, and abuse; property management; computing resources; civil rights and affirmative action; as well as ORS Chapter 244, the Oregon Government Ethics law, which applies to members of the Board of Trustees as well as public employees. Complaint and grievance procedures for faculty (including professional staff) and students exist and are easy to find on OSU websites. The procedures for represented employees (classified staff and graduate assistants) are in the respective collective bargaining agreements. All members of the OSU community can file complaints of discrimination, harassment, and bullying with the Office of Equal Opportunity and Access. OSU did not provide information on the timeliness of complaint processing, but evaluators heard no concerns about complaint or grievance processing at any of the open forums or other meetings on campus.

**2.A.23** As previously noted, ORS Chapter 244, the Oregon Government Ethics law, forbids conflicts of interest on the part of Board of Trustees members and OSU employees. OSU also has several specific policies on nepotism, research conflicts of interest, and procurement conflicts of interest. OSU is a public university and is not affiliated with any social, political, corporate, or religious organizations.

**2.A.24** The OSU Office for Commercialization and Corporate Development manages intellectual property. OSU continues to adhere to the Oregon University System Policies and Procedures on Licensing, Patent, Educational, and Professional Materials Development, and Copyright, which became OSU policy upon Oregon University System dissolution in 2014. These policies are clear and appear to the evaluator to be comprehensive. The Office for Commercialization and Corporate Development also provides Intellectual Property Guidelines for Students.

**2.A.25** A website search for the terms "accreditation" and "NWCCU" returned several mentions of OSU's accreditation status. The Catalog statement is, "Oregon State University is accredited by the Northwest Commission on Colleges and Universities (NWCCU). The university is authorized to offer baccalaureate, master's, doctorate, and first professional degrees, as well as undergraduate-, postbaccalaureate-, and graduate-level certificates. The NWCCU reaffirmed the accreditation of Oregon State University in Spring 2011. The next comprehensive NWCCU evaluation is scheduled for April 15 - 17, 2019." Other statements were briefer, corresponding to the first sentence of the Catalog entry or reporting the 2011 reaffirmation. The evaluator did not find any statements that were inconsistent with the Standard, but notes that the 2011 reaffirmation was dated 8/12/11, based on the spring 2011 Comprehensive Evaluation.

**2.A.26** OSU has extensive standards for procurement, contracting personal or professional services and capital construction and contracting, which are part of the University Procedures and Standards Manual.

These include provisions that address legal and ethics requirements as well as detailed procedures. According to the understanding of the evaluator, a specific issue addressed by this standard is procurement of student services or instruction from entities that are not accredited. The Commission seeks assurance that the institution exercises due diligence to ensure that accreditation policies and standards are met by the contractor. The evaluator did not find any information that indicates that OSU is procuring student services or instruction from external entities, so this aspect of the Standard is apparently not applicable at this time, but OSU might wish to consider some additions to procurement policies that require approval of those types of procurements by the Accreditation Liaison Officer or designee.

### *Academic Freedom*

**2.A.27** The institution publishes and adheres to policies, approved by its governing board, regarding academic freedom. OSU publishes its policies on academic freedom in its *University Policy and Standards Manual*. Furthermore, the *OSU Faculty Handbook* includes a statement on academic freedom and responsibility that emphasizes the freedom in classroom discussion and in scholarly inquiry. Student rights to free speech and assembly and the responsibilities associated with those rights are published in the *Student Code of Conduct*. The *Year Seven Self-evaluation Report* states the OSU commitment to freedom of speech, “Freedom of expression is essential to the university’s commitment to ensure inclusive educational opportunities and to support independent thought and disseminate knowledge”. The evaluator committee did not hear of any concerns about academic freedom at OSU.

**2.A.28** The standards and requirements around the production of research, scholarship and creative activity are published in the *Faculty Handbook*. The commitment to academic freedom is shared by the university administration and the faculty. A 2006 joint statement by OSU’s provost and the Faculty Senate president states that “The essence of academic life is to participate in the astonishingly complex search for truth. As such, the academy must be a place that encourages and celebrates innovative, exiting and unfettered research”. The Graduate School promotes the ethical conduct of research and provides the faculty guidelines to help them mentor graduate students for ethical conduct of research.

**2.A.29** Objectivity of scholarship both in teaching and scholarship are promoted in OSU policies. The OSU’s Code of Ethics calls for “the highest integrity” from all employees. The *Faculty Handbook* and Faculty Policies and Procedures Manual clarify the faculty’s academic freedom with ethical responsibility of conducting teaching and research with intellectual and scholarly honesty. Office of Research Integrity works to ensure OSU employees’ ethical and legal compliance when conducting research and disseminating research results.

### *Finance*

**2.A.30** As an independently-governed public institution, fiscal oversight of the university is directed by the OSU Board of Trustees. The Board’s Bylaws articulate its responsibility for overseeing the university’s financial resources and other assets. The Board has established policies for the oversight and management of finances including Debt Policy, Internal Bank Policy, Liquidity Management Policy, Public University Funds Investment Policy, and Standards for Recognition of a Foundation. The Finance and Administration Committee of the board provides oversight and makes recommendations to the Board of Trustees. Further, the Board has established financial metrics, which it regularly monitors.

## **2.B Human Resources**

**2.B.1** There are clear and publicly available resources that identify criteria, qualifications and procedures for the selection of personnel, which are listed in Exhibit 2.B.1 in the *Year Seven Self-evaluation Report*. There is no formal process to determine “a sufficient number of qualified personnel” across the university. Each dean or senior administrator is responsible for determining what is sufficient. Deans’ employment decisions are shared with the Provost. The Provost can make adjustment to the central budget to ensure some parity between colleges.

**2.B.2** Administrators and staff are evaluated regularly with regard to performance of work duties and responsibilities, as evidenced by the Professional Faculty Evaluation and Performance Evaluation Management System—Classified Employees.

**2.B.3** The university provides professional development opportunities for employees as evidenced by Exhibit 2.B.3 in the *Year Seven Self-evaluation Report*. The ability to track the number of employees accessing training and the number of training accessed would be useful information for the university to gather. Given the nature of training deployment, dispersed among many units, it is difficult for the university to track this information at this time. The planned offering of training through an LMS (Learning Management System) will improve the ability to understand scope and impact of these trainings. This change is being undertaken in summer 2019.

**2.B.4** There is evidence that the university employs a sufficient number of faculty to achieve the educational goals of the institution. The evaluator notes that the faculty numbers reported in the Table 2.B.1 are not the same as those reported in section 2.B.4 of the *Year Seven Self-evaluation Report*, but the difference is small. The *Year Seven Self-evaluation Report* indicates that the student population increased by roughly 12,000 in a decade. Over an eight-year period, the number of faculty increased by 1443. This is a one to eight ratio of new faculty to new students, and the total faculty/student ratio remains well within the national range for research universities. Academic program review, on a 10-year cycle, and external reviews for specialized accreditation include an in-depth analysis of faculty resources and could provide justification for allocation of resources. However, this did not help programs deal with rapid growth since these reviews are infrequent; allocation of resources from the Provost’s office has addressed urgent needs.

**2.B.5** Responsibilities and workload of faculty are commensurate with the institution’s expectations as evidenced by the OSU *Faculty Handbook*, “Promotion and Tenure Guidelines”, and “Academic Appointment Guidelines”. There is consistency between “Promotion and Tenure Guidelines” and the *Faculty Handbook* and “Academic Appointment Guidelines.”

One faculty member contacted an evaluator to raise the concern that it is difficult for tenure-track faculty at OSU Cascades, where teaching and university service loads are heavy, to meet the applicable Corvallis standards for research accomplishments to achieve tenure or promotion. (Cascades Campus faculty are tenured in Corvallis departments and must meet their standards). As tenure track Cascades Campus faculty are few, this issue is not widespread, but evaluators suggest that it be addressed as necessary before many more tenure track faculty are hired at Cascades.

**2.B.6** The “Guidelines for Periodic Review of Faculty” defines the nature and outcome of faculty reviews and provides evidence of compliance with Standard 2.B.6. All faculty are evaluated annually or every



three years, depending on the appointment. Faculty attending meetings with evaluators indicated that they had been evaluated on schedule.

## **2.C Education Resources**

**2.C.1** The approval process for proposals of new programs or degrees is situated in the Curriculum Proposal System, which ensures that all courses and programs have stated student learning outcomes, follow OSU academic regulations and other policies, and meet standards of rigor and appropriate content. Programs originate with the faculty and are reviewed by the Faculty Senate Budgets and Fiscal Planning Committee, Graduate Council, Curriculum Council and Faculty Senate. These processes are advertised and made public through the institution's website. Earlier versions of these processes have been in existence for decades, so existing programs have been subject to thorough review as well. The academic program review process and external reviews of some programs for specialized accreditation offer further assurance of appropriate content and rigor.

**2.C.2** Learning outcomes are developed by faculty, embedded in curriculum as required by the Curriculum Proposal System, and approved by the Faculty Senate. Course learning outcomes are published as a part of course syllabi.

As pointed out by an evaluator in her Standard 2.A.21 review, some program Catalog entries include learning outcomes in the overview section, but currently only a minority of programs do so in the exact words that express the learning outcomes on most program websites. Having learning outcomes for all programs in the Catalog would make it easy for students or prospective students to locate them. The *Year Seven Self-evaluation Report* states that each program and academic unit is responsible for publishing all program learning outcomes on its departmental or college website, but a quick subsampling by the evaluator showed that not all programs have done this, or at least, they have not made the learning outcomes easy to find. Most programs have complied with the requirement, however. All intended learning outcomes are included in the annual assessment reports, but those are not on a public website.

**2.C.3** The Office of Academic Programs and Assessment has created a clear and straightforward process for the submission of an annual assessment report, guidelines for direct and indirect measurements of learning outcomes, and a system of accountability. Developed in part to respond to the Northwest Commission's accreditation standards, it is a system that is understandable, useful and transparent. It appears that there is widespread engagement in this planning and reporting process, although there is still more work to complete in fully documenting that weaknesses in student learning identified using the assessment data are resulting in program improvements.

Programs annually submit assessment reports to the Office of Academic Programs and Assessment, which provides appropriate feedback based on whether the program has conducted full cycle assessment and includes answers to the following questions: What outcome has been assessed? How was the outcome directly assessed? What meaning did you make from the results? And, what was done or changed with the information gleaned from the results of the direct assessment? Such feedback is very important in improving the assessment process.

Evaluator review of many of the reports and discussions with Academic Programs and Assessment staff indicated that, for programs that are offered at more than one location or offered both online and face-to-face, student learning outcomes data are not systematically disaggregated by location or modality of

program delivery. The standard requires institutions to be able to demonstrate that learning outcomes are met for programs, “wherever offered and however delivered.”

**Recommendation, Standard 2.C.3.** As Oregon State University expands its Ecampus, Cascades Campus, and other extended sites, the evaluator committee recommends that the university continues to exercise great care that credit and degrees, wherever offered and however delivered, are based on documented student achievement of the established Oregon State University learning outcomes.

**2.C.4** The OSU goals to produce transformational education, high impact learning, and advance teaching and learning in the Baccalaureate Core are assessed through systematic processes, the analysis of data in Student Affairs, or data that are shared in informal ways across campus through dashboards or other occasional exchanges. The Student Success Initiative is co-led by the Dean of the College of Science and the Interim Vice Provost for Student Affairs, a representation of the breadth of activities under the auspices of this initiative, which engaged more than 300 faculty, staff, students, and institutional leaders. During their first year, the group researched and created a needs assessment, inventory, national benchmarking, metrics, measurements, and technology. The student success summit was another way of engaging a broad group, a total of 309 members of the OSU community. The result was the identification of five focal areas: transition experiences, financial aid and scholarships, faculty student engagement, curricular excellent, and experiential learning. It is clear this initiative has tremendous potential for mobilizing the campus behind student success, but as yet not everyone has been engaged or has become familiar with the data that resulted from the initial year of study. Continuing to measure the impact of these key initiatives will help the institution to focus on the initiatives with the greatest potential to move the needle on key goals.

Degree program admission and completion policies and regulations are appropriately published and communicated through the Catalog, MyDegrees, and university websites. Requirements, including the Baccalaureate Core requirements, are developed by the faculty and approved by the Faculty Senate. Assessment plans are annually reviewed by the Office of Academic Programs and Assessment.

**2.C.5** “Responsibility for departmental and university curricula at Oregon State University rests with the faculty” (*Year Seven Self-evaluation Report*). Faculty are involved in every step in the proposal of new curricula and programs, the recruitment of new faculty and the assessment of student learning outcomes. This is demonstrated in the structure of the processes, the reports generated, and through the publication of outcomes. The assessment of Baccalaureate Core learning outcomes is conducted by faculty, informed by data and self-reflection. These activities comply with the standard and deeply embed faculty in the processes. The Core assessment is described by several of the faculty as particularly rigorous.

**2.C.6** There is evidence that faculty with teaching responsibilities work with OSU librarians to ensure that the use of library and information sources is integrated into the learning process. New program and certificate proposals include a library evaluation that ensures that library collections and services can support the new program; these evaluations include specifics not only about collections but also about librarian expertise available.

The library’s liaison model provides a link between departments and the library; many of the faculty members interviewed knew their liaison librarian by name. Librarians respond to faculty requests in a number of ways: they provide guest lectures tailored to the needs of a class assignment; they conduct

workshops on the topic requested; and librarians have created online content such as LibGuides and modules in Canvas that faculty can incorporate into class content. Faculty members interviewed provided specific examples of collaborations with librarians. For example, a representative from the College of Public Health and Human Sciences said that library resources are part of all its writing intensive courses, including those delivered via Ecampus. A faculty member in Liberal Arts whose course involves collecting oral histories co-teaches her class with a librarian from Special Collections and Archives. Library faculty introduced a Teach the Teacher model to ensure that students in all Writing 121 classes receive research instruction. Writing 121 is the one course that a large majority of OSU students (excepting those who transfer an equivalent course) are required to complete.

**2.C.7** It was verified, through review of credit for prior experiential learning policies on the OSU admissions website, that OSU awards credit based on the Advanced Placement (AP) Examination, the International Baccalaureate, College Level Examination Program (CLEP), and certain military training as delineated in the American Council on Education's (ACE) Guide to the Evaluation of Educational Experiences in the Armed Services. The website also specifies the forms of prior experiential learning that will and will not be considered. While the language on the website makes clear that experiential learning credit is not commonly transferrable, it does not explicitly indicate a cap on possible credits, nor is there specific language on experiential learning credit in the policies and procedures for admissions or academic affairs. The *Year Seven Self-evaluation Report* states that the limit is 25% of the credits required for a student's degree, but it is not clear where that limit is published as an institutional policy.

The OSU transfer website makes particular note of Willamette Promise (a dual enrollment program). It describes how college-level credits earned in high schools will be transferred and transcribed, as well as the role of departmental faculty in determining any OSU course substitution.

**2.C.8** It was verified through examination of the website that transfer policies clearly follow adequate safeguards for quality and appropriateness to a student's course of study. The Office of Admissions website offers extensive resources to assist prospective transfer students. For courses that have not already been reviewed by academic units, a transfer course equivalency petition can be submitted to the academic program chair to assess course equivalency.

**Compliment:** The evaluator committee compliments OSU for providing prospective transfer students access to an equivalency tool that provides a sense of how courses will transfer to OSU prior to a formal transcript review; for providing detailed articulation agreements with all Oregon 2- and 4- year schools as well as Hawaii community colleges; for its policy of accepting Washington DTA (Direct Transfer Agreement) and California IGETC (Intersegmental General Education Transfer Curriculum) for lower division general education credit; and for providing a web-based tool that helps students identify course equivalencies from schools across the country.

**2.C.9** The General Education component (called the Baccalaureate Core at OSU) of undergraduate programs demonstrates an integrated course of study that helps students develop the breadth and depth of intellect to become more effective learners and to prepare them for a productive life of work, citizenship and personal fulfillment. The Baccalaureate Core has been developed and approved by the faculty and represents Oregon State's commitment to the goals of general education as part of bachelor's degree requirements. As stated by OSU, "The Baccalaureate Core promotes understanding of interrelationships among disciplines to increase students' capacities as ethical citizens of an ever-changing world." It does this through a thoroughly vetted and assessed curriculum and through

processes that ensure quality and student learning and reflect the values and commitments of the institution.

The faculty Baccalaureate Core Committee assesses both the ways individual courses meet a General Education requirement and the learning outcomes of the requirements as a whole. Their approach includes direct assessment of artifacts from Baccalaureate Core classes.

The evaluator committee heard comments from several faculty about proliferation of Baccalaureate Core courses, spurred in part by opportunities for additional enrollment and revenue. This can certainly have financial implications, by reducing average Core course section size, and it could make Core learning outcomes assessment more difficult. However, several students stated that they liked the many new options. Either a tightly constructed Core with a small number of courses or an expansive, cafeteria-menu approach can be consistent with the Standard, so evaluator committee members have no input on this issue.

**2.C.10** The institution demonstrated that the General Education components of its baccalaureate degree programs – the Baccalaureate Core – have identifiable and assessable learning outcomes that are stated in relation to the institution’s mission and learning outcomes for those programs. The university’s learning goals for graduates and the Baccalaureate Core learning outcomes, as agreed upon by faculty and regularly assessed, align with the institution’s mission for teaching and promoting economic, social, cultural and environmental progress.

The learning outcomes for the Baccalaureate Core are published in the Catalog and in Core course syllabi, which are tracked on the Curriculum Proposal System website and are reviewed by the Faculty Senate Baccalaureate Core Committee. These processes are transparent, published, and consistent with the mission and goals of the institution. The process is a good example of full-cycle assessment at both the course and institution level that produces data used to inform decisions about curriculum and programs.

**2.C.11** OSU does not offer the type of applied degree or certificate programs to which this standard refers.

### **Graduate Programs**

**2.C.12** The OSU has an extensive array of graduate programs that are integral to OSU’s mission of teaching, research, and outreach. As stated in the *Year Seven Self-evaluation Report* it offers “138 graduate degree programs in 11 colleges across two campuses with 23 programs online”. The Graduate School ensures that all programs are reviewed regularly, so that the programs set clear student learning outcomes, compatible with OSU student learning outcomes, and assess these outcomes.

**2.C.13** The “Policy Governing All Graduate Programs” is published on OSU’s website and specifies the rules and regulations governing the graduate education at OSU. The Graduate School website also clarifies rules regarding admission and graduation requirements for graduate programs. Graduate Council provides faculty oversight on policies governing the graduate programs.

**2.C.14** The Graduate School’s “Policy on Graduate Credit” specifies the rules for when and how graduate credit may be granted for internships, field experiences, and clinical practica. These rules are consistent with the accreditation standards.

**2.C.15** The OSU has Carnegie Research University – Highest Research Activity (formerly known as Research I) status, and graduate programs are integral part of the university’s research enterprise. The focus on increasing the number of tenure track faculty with dedicated time committed for research and scholarship supports the delivery of high-quality graduate programs. The Graduate School is well organized and supports colleges and departments in offering graduate degrees. Resources, process and procedures for graduate school requirements are clearly described in Graduate School website. The university offers many opportunities for assistantships and internships that provide financial assistance to graduate students. The university provides professional development opportunities that include writing mentorship, research ethics, and statistical consulting. All of these indicate that the university is committed to and provides resources for graduate student success.

**2.C.16** OSU offers, as examples of mission alignment with its continuing education and non-credit programs, the successful partnership with INTO, which is building a growing international presence on campus by supporting English language training, and PACE (Professional and Continuing Education), representing the land grant mission with its noncredit course opportunities, including over 200 professional courses and certificate programs and interaction with about 12,000 students/year. Five OSU colleges offer continuing education courses, which is evidence that the commitment to continuing education is not simply the purview of a single unit. OSU Extension’s Service provides non-credit educational opportunities to all 36 Oregon counties, with programming for youth development, family and community health, and forestry, as well as the Open Campus and Outdoor School, a voter funded initiative to provide all 5<sup>th</sup> and 6<sup>th</sup> graders with an outdoor experience.

**2.C.17** Evidence from conversations with PACE and Ecampus representatives supports OSU’s stated commitment to and responsibility for the quality of professional and continuing education programs. Academic disciplines and faculty are closely involved with teaching, course development, quality oversight, and both direct and indirect involvement in hiring instructors, if not teaching courses themselves.

**2.C.18** It was verified through conversations with PACE staff that they work closely with relevant academic units on the planning, learning outcomes, and instructor hiring and/or hiring criteria for courses provided as part of continuing education. PACE uses student course evaluations for part of its assessment process.

**2.C.19** PACE maintains its own registration management and course listings system on a secure platform. Student records, including course completion and grades also are maintained on a secure platform. OSU transcripts document noncredit courses with academic unit designators, course numbering, and titles.

## **2.D Student Support Resources**

**2.D.1** OSU addresses six areas of support for student learning needs – access, community, health and wellness, leadership and citizenship, academic success and support, and transition away from the university. *The Year Seven Self-evaluation Report* provides extensive lists of programs evidencing an emphasis on support of student learning: Table 1, 2.D.1 Access; Table 3, 2.D.1 Community; Table 5, 2.D.1 Health and Wellness, Table 7, 2.D.1 Academic Success and Support; and Table 9, 2.D.1 Transition Out of the University.

The evaluator suggests that the University discusses the increased use of technology in the support of student access, given the impact of the OSU Ecampus. Further, technology offers potentially effective approaches to assist the development and assessment of effective learning environments.

**2.D.2** The university has invested in the development of a coordinated unit, the Clery Compliance Team, that is responsible for all Clery Act data collection, Federal reporting, publication of the required annual reports, and relevant training. The Annual Security and Fire Safety Reports (including crime as well as fire statistics) are publicly available on a website (Exhibit 2.D.2 in the *Year Seven Self-evaluation Report*) and are also available in hardcopy at each OSU campus or center. OSU has a department of public safety and, in addition, contracts with state and local police for the safety and security of students. The contracts cover Corvallis and Cascades Campus locations and the Hatfield Marine Science Center. All three locations maintain emergency response plans and have implemented security policies.

**2.D.3** The university recruits and admits students who will benefit from its educational offerings as evidenced by OSU Admissions and New Student Programs. The Insight Resumé is an additional admission application requirement that enables a more thorough assessment of a student's potential for success at the university.

OSU orients students to ensure they understand the requirements related to their programs of study and receive timely, useful, and accurate information and advising about relevant academic requirements, including graduation and transfer policies. Evidence of this includes the Academic Catalog and website information on "New Student Programs" and "Family Outreach".

**2.D.4** The university maintains a clear and consistent policy regarding program elimination, as evidenced by the "Suspending a Program" process that is available on an Academic Programs and Assessment Office web page. Significant program changes are addressed, in part, via Academic Regulation 28, which provides for making substitutions or exceptions to degree requirements with sufficient justification. The Catalog Rights Policy includes, "Every effort has been made to ensure the accuracy of information in the OSU Academic Catalog. However, Oregon State University or the Oregon State Board of Higher Education [sic] may find it necessary from time to time to make changes in courses, curricula, or degree requirements. Students already admitted to a program in which such changes have been made will be reasonably accommodated, if possible, to ensure their normal progress toward a degree. A student may, however, still be required to conform to changes in courses, curricula, or degree requirements as deemed necessary by Oregon State University or the State Board of Higher Education." No general, formal definition of reasonable accommodations exists, as this varies from program to program. (The evaluator suggests that references to the extinct State Board of Higher Education are removed from this policy).

**2.D.5** OSU publishes a Catalog or provides on its website current and accurate information as required by this standard, except that not all academic programs provide student learning outcomes in the Catalog entry or on other public website, such as the college or department site. However, subsampling by the evaluator indicates that more than 90% of programs have published learning outcomes on a website that is reasonably easy to find. Also, not all programs provide a Sample Plan [4-year schedule for course completion] in the Catalog or other specific information on the time needed for completion.

**Concern, Standard 2.D.5.:** The evaluator committee suggests that OSU publishes learning outcomes for all degree programs and timelines for degree completion in its Catalog.

As it stands, programs are required to publish the learning outcomes on department or college websites. That approach is allowable under the Standard, but there are drawbacks. There appears to be some effort at consistent locations and formats within colleges, but less evidence of that across colleges. In some cases, the outcomes are difficult or impossible for an outsider to find. Also, it is probably quite difficult to monitor all of the department websites for compliance centrally, which is why the Catalog seems a better option.

**2.D.6** Exhibit 2.D.6. in the Self-evaluation report lists websites that are supposed to provide information about licensure requirements for education, counseling, forest engineering, and several health professions. The link provided for Education Licensure leads to an OSU website that describes the process and costs of applying for a teaching license, but not the requirements *per se*. The fee list indicates that certain exams and fingerprinting are required, but there is no additional information about these requirements. There is a link from that site to the Oregon Teacher Standards and Practices Commission website, where it's possible to find a link (in a very long list) to First License: Requirements. Again, there is a long list of possible first licenses, and within that there is the one relevant to most students, Preliminary Teaching License, and the requirements.

The evaluator provides a lot of detail here to point out that it would not be very easy for a prospective student to find or understand this information. More complete information and some explanation on the OSU website would be better. The Cascades Campus links for Counseling and Education licensure and the Forest Engineering program website are similar; all simply include links to State of Oregon websites that, in turn, provide links to licensure requirements (rather cryptic in the case of Counseling) and applications. The provided health professions link does not lead to any licensure requirements at all that the evaluator could find, although since the information is for pre-professional students, licensure eligibility is not a direct result of the programs. There are some omissions from the Exhibit 2.D.6, e.g., the professional programs of Pharmacy and Veterinary Medicine; also, other engineering program graduates in addition to those from Forest Engineering are presumably eligible for Professional Engineer licensure, although that is not necessarily a requirement for employment in engineering fields in the same way that teaching, counseling, pharmacy, and veterinary licenses are required.

According to the understanding of the evaluator, the purpose of Standard 2.D.6 is to prevent students from unwittingly enrolling in programs to prepare for an occupation or profession that they cannot enter. One fairly common barrier is criminal convictions. Another that arises is a requirement for passing standardized, state or national examinations. Also, some students may have challenges in completing required internships or practica. For example, these can require students to temporarily relocate, if such placements are not available in their home community.

The evaluator suggests that OSU could better address this standard by adding some straightforward information on requirements for licensure, if licensure is required for the occupation or profession, to the program web pages. She knows that there are a variety of potential legal concerns, but such information does not need to forbid prospective students from applying or enrolling, but only needs to inform them of potential future challenges in attaining licensure required for employment in the career or profession and to advise them to seek additional information from the licensing entity.

**2.D.7** The institution has adopted and adheres to policies and procedures regarding the secure retention of student records, including provision for reliable and retrievable backup of those records, regardless of their form. The institution publishes and follows established policies for confidentiality and release of student records as evidenced by Exhibit 2.D.7 in the *Year Seven Self-evaluation Report*.

The OSU Office of Information Security employs a third-party agency to conduct an annual security audit of record-storing of student data. An annual self-assessment is also conducted.

**2.D.8** The OSU Office of Financial Aid and the Scholarship Office administer financial aid and scholarships. The evaluator visited the websites and found that the Financial Aid website contains expansive and easily understood information on potential sources of financial aid and scholarships, application processes, maintaining eligibility, and how students can access additional information and assistance. Much of the information is available in video/audio format as well as in writing. The websites of the Financial Aid and Scholarship Offices contain links to each other, so that the administrative separation is, appropriately, largely invisible to students. Cascades Campus offers similar financial aid services to the Corvallis Campus.

**2.D.9** The Financial Aid Office website has general information on student loan repayment requirements, linked from their home page under "Types of Aid". Students receive individual notification of repayment requirements for their specific loan(s). Beginning in the 2018-19 academic year, each OSU student receives an annual notification of their debt, the amount that will need to be paid back (including interest), and projected monthly payment. Financial Aid also provides individual advising and financial literacy and money management workshops. Cascades Campus offers similar advising and workshops. The text of the *Year Seven Self-evaluation Report* shows that OSU is well aware of default rates, which are fairly low compared with the national average.

**2.D.10** The institution supports advising of students at the undergraduate, graduate and professional levels and for prospective, new, and current students. The university offers two models of academic advising. Some of the colleges utilize professional advisors, who work in concert with advisors in academic departments. The other model utilizes a centralized advising office in the college. In both models there is a head academic advisor who reports to the dean or associate dean. The university also operates two councils that coordinate advising practices across the university. The evidence was summarized in Exhibit 2.D.10 of the *Year Seven Self-evaluation Report* and confirmed and augmented during meetings with the Undergraduate Student Success Initiative team and others.

**Compliment:** The evaluator committee compliments OSU on a well-coordinated, robust system of academic advising, that includes prospective students as well as enrolled students and more intensive academic counseling for at-risk students.

**2.D.11** Co-curricular opportunities are abundant and appear to support the mission of the university. These experiences provide opportunities to enhance leadership and involvement, creative expression, communication, self-discovery, community involvement, cultural education, diversity and inclusion. Co-curricular activities are housed primarily within the Division of Student Affairs and include student-led organizations. Evidence was found in the *Year Seven Self-evaluation Report* and linked websites and substantiated during an interview with ASOSU and ASCC leadership teams.

**2.D.12** Evidence presented in the Self-evaluation Report and interviews with student leadership and the University Housing Committee indicate that staff are prepared and processes have been implemented to assure that these services are appropriate to the mission of the university and contribute to intellectual climate of the campus community. Notable services include diverse living and learning communities, themed academic events in the residence halls, diversity and social justice workshops, internships for underrepresented student populations, the Orange Media Network, and various student leadership



activities. Faculty, staff, and administrators provide input and feedback through the University Housing Committee.

**2.D.13** According to the online OSU *Fiscal Operations Manual* (517: Auxiliary Enterprises), Intercollegiate Athletics is an auxiliary and is subject to the normal range of rules that apply to auxiliaries, notably the expectation of self-support. Intercollegiate Athletics receives financial services and oversight from the Auxiliaries and Activities Business Center, which has responsibility for other OSU Auxiliaries as well. In contrast to most auxiliaries, however, Intercollegiate Athletics cannot charge academic or administrative units for use of their facilities, because OSU Educational and General funds pay for a portion of the costs.

All students apply to the university against the same academic standards. Applications from prospective student athletes are flagged, however. Athletes and all other applicants that meet published admission standards are admitted. A small number of prospective athletes who do not meet the University's academic standards (i.e., a preferred 3.0 high school GPA and SAT or ACT scores indicating that the applicant is prepared for college) for admission can appeal to the Athletics Admissions Committee. That committee considers the student's original application materials as well as any additional materials, such as letters of recommendation. The Athletics Admissions Committee is empowered to admit applicants who were initially denied admission, if the members decide that the applicant can succeed academically at OSU. The committee is composed of members of the faculty and academic administration and reports through the Provost's Office. Once admitted, student-athletes are subject to the same academic standards and requirements as other students. This information was included in the *Year Seven Self-evaluation Report* and confirmed during an interview with the Provost and his staff.

The evaluator found, through a search of the OSU website, that many undergraduate applicants who are initially denied admission may appeal to the Undergraduate Admissions Committee. The appellants are required to provide additional information, such as a personal statement and letters of recommendation. This process appears parallel to the Athletics appeal process, so the prospective student-athlete process differs mainly in that the appeal is considered by a different committee.

**2.D.14** Information in the Self-evaluation Report and at the Ecampus website indicates that there is one authentication process – ONID network credentials – for all OSU students, in terms of gaining access to the learning management system (LMS) and other OSU resources. Ecampus students are informed of the authentication process during the mandatory online new student orientation process. Ecampus does employ proctoring for some assessments or examinations, and a student must show photo ID to the proctor to begin these. Proctoring is optional, and it is usually departments or colleges that decide whether a course should include proctored work. If used, proctoring is normally for examinations only, so a portion of the class experience does not require photo identification for participation.

## **2.E Library and Information Resources**

**2.E.1** The Oregon State University Libraries and Press (OSULP) is committed to the larger university mission and core themes, as can be seen in the mission statement: "We advance OSU's mission by contributing to learning success, scholarly excellence and community engagement, and by respectful and proactive stewardship." As documented in the *Year Seven Self-evaluation Report*, OSULP either holds or provides access to the depth and breadth of resources needed to support the mission, programs and services of the university. Resources in electronic formats make up a significant part of the collection; access to these e-resources supports users whether they are on the Corvallis campus, at

one of the remote sites, or involved in online courses. The Libraries have entered into partnerships and consortia memberships to maximize the use of acquisition funds and to provide users substantially greater access to resources. However, serial cost inflation is an ongoing concern for OSULP and is impacting the ability to add new content.

OSULP also fulfills the university's land grant mission by offering access to information via collaborations like that with the University of Oregon that created Oregon Digital, which serves up online access to digitized materials at both libraries. The ScholarsArchive repository provides public access to the research and scholarly output of OSU. Document delivery services supply users with resources that are not in the OSU collection. Several faculty members mentioned this valuable service during interviews.

**Concern, Standards 2.E.1 and 2.E.3:** While most of the OSU libraries are administered centrally, the OSU-Cascades Campus Library and the McDowell Veterinary Medicine Library are not. There is mutual cooperation among these libraries and the libraries share many resources. However, it is not clear that students and faculty at the remote campuses and centers have access to the same library and information resources, information literacy instruction (in the case of students), and other services as students and faculty at the Corvallis campus.

**2.E.2** As described in the self-evaluation report, OSULP has a long-established cycle of planning and assessment that guides library services and resource allocation. This has resulted in innovations that support student success and core themes. OSULP recently won the prestigious 2019 Association of College and Research Libraries (ACRL) Instruction Section Innovation Award for its undergraduate Research and Writing Studio. Currently underway is a renovation to the Valley Library's sixth floor, which is developing space specifically for graduate students. OSULP has implemented services around affordability, such as its OER (Open Educational Resources) program that helps faculty identify possible open-access texts, its long-term checkout of laptops to students, and its child care service (Our Little Village).

Information to guide planning comes from a number of sources on a regularly scheduled basis. In addition to using national surveys such as LibQual and NSSE, a triennial user satisfaction survey has been implemented. OSULP gathers statistics and feedback from its public service points and from participants in instruction sessions. A Student Advisory Committee was recently established. Open campus forums on planned changes are held. Also used are informal tools such as questions posted on flip charts or whiteboards in the library that students can respond to on the fly.

The Faculty Senate Library Committee ensures that faculty have a voice in library planning and decision-making. Members are selected by the Faculty Senate Executive Committee and serve three-year terms. Efforts are made to include representatives from across the campus. The committee serves as a liaison between Faculty Senate and the libraries.

Collections are assessed on an annual basis. The collections assessment librarian is involved in reviewing proposals for new programs to ensure that the library has the requisite resources for support. A demand-driven acquisitions model ensures user input into library collections' decisions and provides the library data on the needs of its users.

Space planning incorporates service design principles. For example, space utilization surveys are conducted on a regular schedule; these include observations of how users are interacting with the space

along with analyses of the collection and instruction trends. This practice serves to identify pilot projects that can be implemented fairly quickly and tested.

In addition to gathering information, the library is active in sharing library information with its users; its strategic and assessment plans are posted on its website. Yearly library impact reports are also made available online. The library faculty has a record of scholarly activity, much of which is based around primary assignments related to teaching and learning. These articles and books are available to the public online.

**2.E.3** OSULP uses its liaison librarians and partnerships with faculty to integrate information, data, and primary source literacy instruction into the curriculum. The OSULP instruction program is robust and targeted; librarians have worked to identify alternate delivery models to both address the growing information needs of users and to meet the campus goal to move “beyond one-size-fits-all learning”. The Guin Library director provides instruction at both the Hatfield Marine Sciences Center and the McDowell Veterinary Medicine Library. OSU-Cascades manages its own instruction program. OSULP has a librarian liaison to the ECampus program as part of its effort to make library instruction available whenever and wherever needed.

Librarians offer support for credit courses via course-integrated instruction at the request of faculty. The Teach the Teacher program provides research instruction for all students in first-year composition courses. Workshops on a variety of topics are also provided. Peer-to-peer learning is a focus of the undergraduate Research and Writing Center, as well as a new program in development, peer-led technology workshops.

Online subject and course-specific LibGuides allow both on-campus and online users to learn about library resources and services independently. There are also “learn about” guides that provide self-help on library basics such as using databases, citing sources, understanding academic integrity, 3D printing, and more. One guide is devoted to providing library information of interest to online and international students. The Libraries provide point of need assistance via Ask a Librarian services; users can drop by the information desk if on campus or can chat, call, text, or email library staff.

The importance of teaching to OSULP is demonstrated in a number of ways. The Library has a robust instruction assessment plan that gathers feedback using a variety of methodologies. Teaching is included in the promotion and tenure process, with peer evaluation required for both the third and fifth-year reviews. The scholarly output of librarians involved in the teaching enterprise is impressive.

**2.E.4** OSULP has documented in the self-evaluation report how it regularly and systematically evaluates library and information resources and services. That assessment is part of the culture of OSULP can be seen in the positions devoted to these efforts; an assessment librarian is part of library administration and a collection assessment librarian is assigned to the Resource Acquisition and Sharing Department. As summarized in 2.E.2 above, OSULP solicits, collects, and analyzes feedback from constituents on a cyclical basis. OSULP works with the Office of Information Security to evaluate and maintain the security of library systems and e-resources.

**Compliment:** The evaluator committee compliments OSU on the long-established library planning and assessment efforts that have resulted in innovations, such as the undergraduate Research and Writing Studio and the graduate space currently under development, that are meeting evolving user needs.

## **2.F Financial Resources**

**2.F.1** Since becoming an independently-governed public institution in 2014, OSU has become even more disciplined on financial matters. For example, the OSU Board of Trustees has established a number of practices and measures to assess the financial position of the university. Total net position in FY2018 decreased by \$26 million, primarily due to a decrease in restricted expendable and unrestricted new position, while cash and cash equivalents increased by \$15 million in FY2018. Total accounts receivable also increased by \$17 million. The majority of the university's cash and cash equivalents are invested in the Oregon Short-Term Fund, which is managed by the Oregon State Treasury and provides daily liquidity. The Board approved Debt Policy includes five metrics to monitor debt capacity and affordability. In FY2018, long-term debt increased by \$55 million reflecting an additional \$73 million of new revenue bonds earmarked for construction. The University is currently rated by Moody's with an Aa3 rating for general revenue bonds and a stable outlook.

**2.F.2** OSU is committed to sound financial management and utilizes a 10-year business plan, composed of a 10-year capital forecast and a 10-year operational forecast. OSU's Office of Budget and Fiscal Planning works closely with enrollment management on a multi-year enrollment projection based on varying student characteristics, program level, and delivery mode/location. Enrollment projections are particularly important as a large portion of revenue is dependent on tuition. The annual operating budget is prepared and published annually. In addition to the education and general budget, annual budgets for major auxiliaries as well as smaller auxiliaries, designated operations and service departments are developed, approved, and reviewed. Restricted funds are projected based on historical trends with grants and contracts projected annually based on awards submitted and received. The annual operating budget is monitored with actual results compared to budget provided to the Board in quarterly management reports.

**2.F.3** OSU has recently implemented a new shared responsibility budget model for the Corvallis campus. Information on the Corvallis budget model is available on OSU's website and open budget conversations are hosted on a regular basis. This new model is a hybrid responsibility-centered management model with budget allocations to academic units linked to measures such as student credit hours, research activity, and degrees awarded. The University Budget Committee, comprised of students, faculty, and administrators representing various campuses provides advice on key elements of the budget planning process, including recommendations for tuition rates. Throughout the budget process, various constituencies are provided with budget information, apprised of budget projections, and provided opportunities to make budget presentations to decision makers.

The OSU-Cascades budget model is available on the website. This process provides opportunity for program leads and Deans to develop proposals for funding consideration and considers program performance measures.

**2.F.4** OSU follows Generally Accepted Accounting Principles (GAAP) and Governmental Accounting Standards Board (GASB). The university uses Banner for financial accounting and reporting according to budget requirements and various requirements of restricted funds. The Office of Budget and Fiscal Planning and the Office of the Controller centrally manage the income and expenditures of the university. Business centers and the OSU-Cascades business office work with central financial units to administer financial resources and provide timely and accurate financial information. OSU's Cooperative

Open Reporting Environment (CORE) is a comprehensive financial reporting system that provides reports on demand to budget managers.

Annually conducted external audits include an assessment of internal controls over all material financial functions. OSU has achieved an unmodified opinion in each of the last six years.

**2.F.5** OSU produces a Capital Forecast, a 10-year rolling plan that supports OSU's vision, mission, and strategic plan, which is updated annually to reflect institutional priorities and respond to opportunities. This plan includes five biennial capital plans identifying costs to acquire, develop, renovate, and/or improve a capital asset as well as sources of proposed funding. Capital projects are solicited annually. Through a collaborative process engaging a range of campus stakeholders, a draft plan is presented to the Vice President of Finance and Administration, OSU-Cascades vice president, Provost, President and Board of Trustees. Recognizing the impact of capital planning on financial planning, the 10-year Capital Forecast is incorporated into the Business Forecast. The Board of Trustees has adopted a Capital Projects Approval Policy and a Debt Policy. The Debt Policy includes five metrics to monitor debt capacity and affordability. OSU has identified significant deferred maintenance and capital renewal needs on the Corvallis campus. To address these needs, an annual funding source of \$45 million is being created, with an allocation of \$5 million ongoing each year for a planned nine years. In addition to this investment in deferred maintenance, a stewardship fund has been initiated as part of all new major capital projects to support the replacement of major building systems.

**Commendation:** The evaluator committee commends Oregon State University for taking steps to allocate substantial resources to address needed repair and renovation of facilities on the Corvallis Campus.

**2.F.6** Auxiliary enterprise revenues and expenditures are budgeted and monitored separately from general operations. Generally, auxiliaries are expected to generate sufficient revenues to cover their operations and provide sufficient reserves for capital renewal. Intercollegiate athletics, an auxiliary by NACUBO definition, operates with a variety of resources including an allocation from educational and general funds. Auxiliary managers told the evaluator that OSU charges auxiliary enterprises administrative overhead of three percent annually.

**2.F.7** OSU's annual financial report is audited annually and in accordance with generally accepted auditing standards by a nationally recognized firm, CliftonLarsonAllen. The external audit report, including findings and management letter recommendations, are presented each January to OSU's Board of Trustees Executive and Audit Committee. Federal compliance audits are also conducted annually.

**2.F.8** OSU's financial statements include, as component units, OSU Foundation and The Agricultural Research Foundation. Fundraising and philanthropic activities of OSU are conducted in a professional and ethical manner through the Oregon State University Foundation, a separate 501(c)3 organization. Oregon State University Foundation operates independently of OSU, with OSU Foundation's relationship with OSU detailed in an agreement that is renewed annually. All fundraising and investment activities of the Foundation are limited to benefiting Oregon State University. In addition to conducting fundraising and fiduciary responsibilities, OSU Foundation provides fundraising services for OSU including marketing, donor relations, and stewardship.

The Agricultural Research Foundation (ARF) manages funds privately and publicly donated for fostering scientific research in the fields of agriculture and natural resources at Oregon State University. ARF is a separate 501(c)3 organization and operates independently of OSU; the relationship between OSU and ARF is articulated in an agreement that is updated every five years.

## **2.G Physical and Technological Infrastructure**

### **Physical Infrastructure**

**2.G.1** OSU operates the Corvallis campus, the Cascades campus, 12 Agricultural Experiment Stations, the Hatfield Marine Science Center, OSU in Portland and numerous other locations across the state, housed in both owned and leased facilities. University Facilities, Infrastructure, and Operations (UFIO) conducts building condition assessments and space utilization reviews. New facilities meet accessibility standards; OSU has barrier and path-of-travel assessments for nearly every major building, sidewalk, and street crossing on campus. Campus safety is a high priority, from improved exterior lighting to added security cameras. To improve safety, exterior access into some buildings will be limited to two points of entry.

The Corvallis campus serves the largest student population and supports teaching, research, outreach, administrative services, and auxiliary services. This campus includes 83 structures in the Historic District on the National Register of Historic Places, as well as new, state-of-the-art facilities for learning, research, and student life. In its 10-year Capital Forecast, OSU has prioritized the need to address deferred maintenance and renovate or, in some cases, demolish facilities on the Corvallis campus.

The Cascades campus has new facilities which were designed to be accessible, safe, secure, and environmentally sustainable, with an emphasis on flexibility for evolving pedagogy. The Hatfield Marine Science Center is expanding with the addition of a 72,000-square foot Marine Studies building to support a planned expansion of marine studies programs.

**2.G.2** OSU has policies, procedures, education, and training to ensure the safe use, storage, and disposal of hazardous materials in accordance with local, state, and federal requirements. These policies and procedures apply to all OSU campuses and facilities. Environmental Health and Safety's website provides extensive information regarding programs and services, training opportunities, resources, and a form for reporting a safety concern. Policies and procedures are reviewed annually and when new regulations require change.

**2.G.3** The 2004 Campus Master Plan identifies guiding principles and policies and provides the framework for the Corvallis campus. This plan assists in the development, improvement and renewal of facilities and infrastructure. OSU is in the process of creating a new Strategic Framework Plan with the aid of an external consultant. This new plan will guide the development of the campus over the next decade, including the annually updated 10-year Capital Forecast.

The OSU-Cascades Long-Range Development Plan was completed in 2017 and identifies a phased approach to the development of this campus. The plan will be reviewed regularly with updates provided to the city of Bend at least once every five years. The Hatfield Marine Science Center is undertaking long-range strategic planning in anticipation of student growth, new faculty, and research activities.

**2.G.4** OSU is comprehensively wired and has wireless internet access in all buildings to support the use of technology. Most university classrooms are equipped with state-of-the-art instructional technology and furniture has been replaced to accommodate flexible instructional configurations. Research laboratories typically have state-of-the-art equipment.

### **Technological Infrastructure**

**2.G.5** The Division of Information and Technology (UIT) guides OSU's information technology enterprise and supports university-wide technology and infrastructure. UIT has adopted a cloud first strategy to provide contemporary, secure, scalable, 24/7 technology services and solutions to OSU's locations. OSU's administrative services use the Banner ERP (Enterprise Resource Planning) system. The cloud-based learning management system (Canvas, Learn@OregonState) is the common instructional platform for OSU's credit and noncredit programs. OSU faculty, staff, and students have access to cloud-based productivity solutions (Box, Google G Suite, and Microsoft Office 365). IT systems are supported by a campus network with appropriate information security systems and controls.

**Commendation:** The evaluator committee commends Oregon State University on the design of its websites, which makes it particularly easy and intuitive for prospective students and others to find needed information.

**2.G.6** Online training and support is offered to faculty for the core Learn@OregonState suite of instructional systems. In order to develop and teach courses for Ecampus, faculty must complete a six-week training, which is delivered online to a cohort of faculty and supported by an instructional designer. Further, new students may not enroll in Ecampus courses until they have successfully completed an online training. Face-to-face and online training is offered for Banner and the data warehouse, including functions and navigation, data security, and confidentiality training.

**2.G.7** Three governance committees provide a structure for gathering input on major IT initiatives and IT policies. Additional constituency groups for key technology platforms provide input informing planning and decision-making for those systems. Other avenues for input include the IT Coordination Committee, consisting of lead college or administrative unit IT staff and managers, and the Department Computer Administrators group, consisting of frontline IT staff.

**2.G.8** OSU's central Technology Commons Funds provides annual funding to support maintenance and regular refreshing of existing infrastructure, including audio-visual systems and equipment in instructional spaces. This fund supports replacement of student and instructor-used computers in central computer classrooms, open access computer labs, etc., with a standard practice of replacing computers every four years. Network and telecommunications infrastructure are replaced as needed, through a combination of bond funding, annual operating funds, and a reserve fund.

## **STANDARD THREE – PLANNING AND IMPLEMENTATION**

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### **3.A Institutional Planning**

**3.A.1** OSU has an unusually strong, sustained, and inclusive process of strategic planning, begun in 2003 and repeated for four five-year periods, culminating in Strategic Plan 4.0 for 2019-2023. Before the Strategic Plan 4.0 process, OSU produced "VISION 2030: Distinction, Access and Excellence" in fall, 2017.

This effort “sought to anticipate OSU’s future unique contributions on the higher education landscape” and provide a longer-term framework for five-year strategic planning. All of the Strategic Plans have established goals that related directly to the OSU mission; recurring themes have been high-quality education, broad access to higher education, research excellence, outreach and collaboration across Oregon and beyond, increasing revenues, and innovation in all areas of endeavor. Strategic Plan 3.0 spanned most of the current accreditation cycle. All of the Strategic Plans were widely disseminated when completed, and Strategic Plan 4.0 is easily found by searching the OSU website.

All individuals and groups that evaluators met indicated that the Strategic Plans have been implemented and indeed have been central to other planning efforts and to decision-making across OSU. Progress reports are published annually by the Office of the Provost, and the progress report is presented to the Board of Trustees.

Each academic college and the other major administrative units of OSU have unit strategic plans that align with and help to support progress toward institutional strategic plan goals. Further, each unit is expected to prepare an annual plan, constructed using a template, that describes how the unit will address the OSU mission of teaching, research and service. These plans are integrated at the college or major administrative unit level, and then further integrated into a University-wide planning goals by the Provost’s Office. This process has been sustained since the initial Strategic Plan was implemented in 2004.

OSU differs from many institutions in that a strong institutional culture of planning existed before the new NWCCU accreditation standards were promulgated. So, the OSU planning processes were not built based on the terminology of core themes, objectives, and indicators, but those elements are present under different names, e.g., goals, tactics, metrics and benchmarks in the case of Strategic Plan 4.0.

In addition to ongoing Strategic Planning, OSU has been producing the Capital Forecast, a 10-year rolling plan that supports OSU’s vision, mission, and strategic plan, which is updated annually to reflect institutional priorities and respond to opportunities. This plan includes five biennial capital plans, identifying costs to acquire, develop, renovate, and/or improve capital assets as well as sources of proposed funding.

OSU also prepares a 10-Year Business Forecast, which is updated every two years. The forecast is “intended to identify long-term trends in the University’s finances that support or jeopardize the goals of the Strategic Plan. The forecast provides a look far enough ahead to take corrective action or to plan for additional investments and to make sure that the long-term impacts of current programmatic and financial decisions are considered. The forecast considers enrollment projections; tuition rates; expense projections for inflation, benefits, salaries, and enrollment growth; and new construction, renovation, and repairs with associated operating and debt costs.”

In addition, several planning efforts engaging units across the University address specific Strategic Plan goals. These include the Research Office Work Plan and the Diversity Strategic Plan 2018-2023. In 2018 the Provost appointed a Strategic Enrollment Management Steering Committee, charged with developing and annually updating a university-level undergraduate and graduate enrollment plan, overseeing its implementation, and monitoring progress on achieving the plan’s goals.



**Commendation:** The evaluator committee commends Oregon State University for developing a robust culture of planning, including regular strategic planning and well-integrated planning for multiple levels and time periods.

**3.A.2** All individuals and groups that evaluators met indicated that they had ample opportunities to provide input into institutional Strategic Planning as well as the development of plans in their own unit. These opportunities were available to students and classified staff as well as faculty and administrators. The *Year Seven Self-evaluation Report* indicated that the most recent, Strategic Plan 4.0 process was led by a representative steering committee and that the process included holding nearly 20 forums with University community members and other stakeholders.

**Compliment:** The evaluator committee compliments OSU for the widespread engagement in the strategic planning processes. We saw this at every level including deans, faculty, staff and students. OSU has done an excellent job of creating multiple ways for gathering input from students, faculty and staff, which resulted in commitment to the plans and a generally positive attitude about the goals.

**3.A.3** Each of the Strategic Plans included performance measures and quantitative targets for improvement and each (except of course the initial one) was developed based in part on the institution's progress in achieving the goals of the previous plan. The 2014-2018 Strategic Plan 3.0 included 16 "Benchmarks for Excellence" that are expressly tied to the OSU mission and goals. Many of these were included as "Yardsticks" in the OSU definition of mission fulfillment in the *Year Seven Self-evaluation Report*. Unit strategic plans are expected to contribute to the attainment of institutional strategic plan goals and to be informed by unit performance data. OSU has employed a data warehouse to provide data access for units, and OSU Office of Institutional Research has provided a variety of standard data reports to inform planning at all levels. More recently, the Common Open Reporting Environment (CORE) was developed to provide access to operational data.

**3.A.4** OSU Strategic Plans have been admirably concise and focused, and clearly articulated priorities. The annual planning process, based on the institutional and major unit strategic plans and progress toward the goals thereof, has been a basis for budget allocations. Recently, the Shared Responsibility Budget Model has added a formula-based allocation to the process. Under this model, 65% of non-dedicated revenues are distributed to academic units based on credit hours (by level), degrees granted, and research activities, with extra allocations for degrees awarded to members of certain populations (international students and Pell recipients, for example). This model helps to direct resources to the academic units that need them due to enrollment growth, as well as providing performance incentives in areas related to institutional goals. There have been adjustments for colleges whose activities are less focused on undergraduate education, since the model allocates the most funds to colleges with large undergraduate programs, but some colleges and departments remain concerned that they will be disadvantaged. The model will likely be changed over time, since there is expressed intent to modify it as needed to ensure that it supports, rather than hinders, progress toward strategic goals. The Shared Responsibility Budget Model applies only to Corvallis Campus.

**3.A.5** OSU created an Emergency Management Office in 2013. Using an all-hazards approach, a comprehensive Emergency Operations Plan (EOP) was developed. EOPs exist for Corvallis Campus, Cascades Campus, and the Hatfield Marine Science Center. These plans follow national standards and exercises and drills have been held. OSU Alert, an emergency notification system, has been implemented, and students who attended meetings with evaluators were familiar with it. In addition to

these campus-wide efforts, the Emergency Management Office assists units in development of internal emergency plans. Overall, the evaluator thinks that OSU emergency planning is exemplary.

The standard also addresses continuity and recovery of operations planning (COOP) should catastrophic events significantly interrupt normal institutional operations. Hatfield Marine Science Center has developed such a plan, spurred in part by the danger of tsunamis. However, the evaluator could not find COOPs for Corvallis and Cascades campuses on the OSU website, nor was this addressed in the *Year Seven Self-evaluation Report*. The Vice President for Finance and Administration indicated that a Business Continuity Plan had not yet been completed, but that it was under consideration. OSU has been implementing changes that support continuity of operations, for example, use of cloud-based applications. The learning management system, Ecampus support services, and the fact that many of the faculty teach online are also significant assets.

**Concern, Standard 3.A.5.** OSU should continue developing continuity of operations plans for Corvallis and Cascades Campuses.

### **3.B Core Theme Planning**

**3.B.1** OSU's planning process is well-aligned; in effect, institution-level strategic planning and core theme planning are one and the same. Strategic Plan 3.0, the one in force for most of this accreditation cycle, had the goals: provide a transformative educational experience for all learners; demonstrate leadership in research, scholarship, and creativity while enhancing pre-eminence in the three signature areas of distinction; and strengthen impact and reach throughout Oregon and beyond. These correspond to the more generically stated core themes of undergraduate education, research and graduate education, and outreach and engagement. Since college and major unit strategic plans are aligned with the institution's Strategic Plan 3.0, they address the core themes. As noted under Standard 3.A.1, there are two recently completed institution-level plans that are also aligned with Strategic Plans 3.0 and 4.0, the 2017 Research Office Work Plan (addressing core theme two) and the Diversity Strategic Plan 2018-2023 (addressing aspects of core themes one and three). In 2018 the Provost appointed a Strategic Enrollment Management Steering Committee, charged with developing and annually updating a university-level undergraduate and graduate enrollment plan (core themes one and two). OSU has achieved widespread commitment and engagement in the strategic planning processes.

Although there has not been an institution-level planning effort specific to core theme three, there is evidence of alignment among Strategic Plan 3.0 and 4.0 Goal 3, core theme three, and activities in support of attainment of core theme three and Goal 3 objectives. Support for and growth of PACE (indicator 3.1.3); re-alignment of the growing Ecampus (indicator 3.1.1), which now reports directly to the Provost; and the investments in innovation and start-up activity (e.g., the OSU Accelerator) demonstrate that financial resources, time, and effort are being directed toward the core theme three objectives. The reorganization of international study abroad (indicator 3.3.4) appears to be an investment in aligning the activity with both the academic mission and student success, even though its growth is not as robust as hoped. Additionally, collaborations, though not clearly defined, are present throughout the activities of Extension (indicators 3.1.5, 3.3.2) and, increasingly, in the form of public/private collaborative start-ups (indicators 3.2.4, 3.3.5)

**3.B.2** OSU chose core themes consistent with the University's mission as a Land Grant institution and consistent with the goals, strategies, and initiatives that had been developed in campus wide strategic planning that pre-dated the implementation of the current NWCCU accreditation standards. The core

themes emerged through an open process, including a steering committee, open forums, engagement through the Provost's website, and conversations with key upper administrators and councils. Commitment to distinctive academic programs and excellent student learning environments are embodied in each of the three core themes. As a long-established university, OSU already has the vast majority of the components and services needed to achieve its objectives, but these are being selectively augmented to foster improvement, and some new activities have been added. Relative to core theme one, OSU has clearly focused effort and financial resources on achieving its objectives of providing broad and continuing access to undergraduate university degrees, rigorous and effective undergraduate degree programs, a supportive and healthy learning environment, and undergraduate curriculum enriched by faculty research and scholarship. Examples include the rapid increase in online offerings of degree programs, the expansion of Cascades Campus, the Undergraduate Student Success Initiative, and several programs aimed at recruiting more diverse undergraduate students.

For core theme two, one area of investment is infrastructure, including some new facilities, but in addition a long-term commitment of resources for repair and renovation of existing buildings on the Corvallis Campus. Also, OSU is committing resources to tenure-track faculty hires, improvement of research administrative services, and providing a variety of incentives and assistance to faculty to increase grant proposal submissions and success.

The evaluators were provided with numerous examples of core theme three initiatives during the site visit. The OSU Advantage (connecting business, faculty, students and facilities to "bring ideas to market"), OSU Accelerator (to develop high growth products and services), the TallWood Design Institute (collaboration between OSU College of Forestry, College of Engineering and UO School of Design), PAC Wave Test facility, and family and community health initiatives of the College of Public Health and Human Sciences are some of the initiatives discussed. Each of these programs, many of them recently formed, aligns with the goals of core theme three. Their interdisciplinary qualities indicate a level of coordinated planning amongst the stakeholders. It is less clear that planning regarding these is intentional at the institutional level.

**3.B.3** Core theme one reflects the institution's efforts to recruit a high-achieving, diversified student body and to ensure their success by tracking first-year retention and six-year completion rates. Objectives are providing and valuing access, rigorous and effective undergraduate degree programs, healthy supportive environments, and research and scholarship that enriches the curriculum. This was exemplified in assessment plans, strategic plans, and conversations with every constituent group; all indicated that measures were tracked at the unit level as well as at the institutional level, and that the data informed plans and actions.

Clearly defined data have also informed planning for core theme two, Research and Graduate Education. These data include grant and contract funding, the size of graduate student body, and the number of underrepresented students among graduate students.

In Strategic Plans 3.0 and 4.0, OSU has identified three "signature areas of distinction" in research (SP 3.0) or in teaching, research, and outreach (SP 4.0): 1. Advancing the science of sustainable Earth ecosystems. 2. Improving human health and wellness. 3. Promoting economic growth and social progress. While these are bold choices, it's not completely clear to evaluators how these areas were selected and defined, nor how progress in these areas is assessed.

Outreach and Engagement has, in some areas, consistently gathered robust data to inform progress toward and accomplishment of core theme objectives. External funding opportunities have grown (e.g., Federal funding for clean energy manufacturing, programs run through the OSU Accelerator), and the number of certificates awarded has increased. Certainly, the Open Campus initiative, with its College readiness and Latino graduation efforts through Juntos and its degree completion programs, offers strong evidence of progress towards goals. In some cases, however, the indicators of achievement do not lend themselves to data analysis or do not provide a sense of what constitutes success. Some programs, such as the longstanding Extension programming across the state, are arguably responsive to community needs, but OSU has not fully developed a way to measure the effectiveness of some of its programs. Volunteer hours and participant counts act as proxies for how much the community values Extension programs. Extension recognizes the challenge and is exploring external data to support demonstrated improvement or impact – economic or otherwise – in the communities it serves.

## **STANDARD FOUR – EFFECTIVENESS AND IMPROVEMENT**

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### **4.A Assessment**

**4.A.1** Data are systematically gathered by Institutional Analytics and Reporting, Budget and Fiscal Planning, Enrollment Management, Research, Academic Programs and Assessment (APA) and the divisions of Student Affairs and Outreach and Engagement, and are analyzed and used in assessment of the core themes, helping the institution to make data informed decisions and improvements. Many of the same “Yardsticks” that the university uses to articulate mission fulfillment are used to track strategic plan progress. However, many of the indicators measure inputs or processes rather than achievements. Examples of this are application, admission, and enrollment data; percent of learning outcomes assessments and program reviews completed; student participation in several kinds of enrichment or retention activities; grant and contract expenditures; and the fraction of tenure-track faculty in the total number. These indicators can be useful for assessing whether the institution is on track but are not as appropriate for evaluating the accomplishment of core theme objectives. However, there are some indicators that measure outputs, including aggregated and disaggregated graduation rates and faculty publications. OSU evaluates mission fulfillment of core theme three as inputs measured by enrollments/counts in Ecampus PACE, extension, study abroad and youth programs, and external funding awards, and as outputs measured by certificates earned, Citizen Evaluation of Teaching scores, research collaborations, global partnerships, and impact measures of statewide programs and economic development. As with the measures for other core themes, inputs are easily measured, but of limited use in assessing outcomes. Some of the output data are relatively stronger outcome indicators, such as certificates earned, research collaborations, and global partnerships. Some indicators don’t provide a way to measure success, such as examples of start-ups or examples of outreach and engagement in the curriculum. In the case of Extension and for OSU’s tech transfer and innovation efforts, it seems there is a missed opportunity to build an evidence-based case for economic impact across the state (indicator 3.3.1).

**4.A.2** OSU assesses teaching and learning, research and scholarship, and outreach and engagement. The data and indicators for each core theme were synthesized by faculty groups, which also identified areas for improvement. Graduate and undergraduate programs undergo periodic review to ensure learning outcomes are in place, resources are appropriate, and quality is achieved. Course learning outcomes are clearly and consistently stated on syllabi. Program learning outcomes and their

assessment are annually reported to and reviewed by the Academic Programs and Assessment Office. Faculty are at the core of these processes and evaluated the objectives for each core theme. Service units such as the Academic Achievement Office do numerous surveys of students' needs and preferences and regularly adjust programs and services to serve students where they are.

The Research Office is active in benchmarking the achievements of OSU's research enterprise and also assesses its own effectiveness in supporting research-active faculty. The Research Office, in coordination with academic leaders and faculty, regularly reviews research centers, institutes and core research facilities. The Graduate School works with academic leaders and Graduate Council to facilitate all graduate program reviews on a regular basis.

Where outreach and engagement data are collected in a form that lends itself to systematic evaluation of programs and services, there is evidence that this is occurring. Examples include Citizen Evaluation of Teaching, number of start-ups, number of certificates awarded, continuing education course learning outcomes, and volunteerism as an indicator of engagement. In the self-evaluation report and in conversations with Continuing Education representatives, there was evidence that faculty have clear oversight of academic program quality in PACE programs from design, including faculty hires and evaluation. What remains a challenge, for some objectives in core theme three, is articulating indicators that are evidence of success rather than effort or activity.

**4.A.3** The OSU student learning outcomes assessment process, executed by the Academic Programs and Assessment Office, has appropriate templates, timelines, processes, instructional sessions and support mechanisms to make it possible for the institution to make a regular, effective and comprehensive assessment of student achievement. As noted elsewhere in this evaluation report, assessment needs to be sustained and improvements based on assessment need to be more consistently documented, but there has been substantial progress since OSU's last comprehensive evaluation.

**Compliment:** The evaluator committee compliments the Academic Programs and Assessment Office, colleges, academic departments, and faculty for reaching 100% compliance in submitting annual student learning outcomes assessment reports.

**4.A.4 and 4.A.5** Broadly, these standards are addressed in part through regular review of the ways programs and services align with the goals of institution level and unit level strategic plans during the Annual Planning process, which is part of the annual budget process. Unit strategic plans are aligned with the core themes because they are aligned with the institutional strategic plan, and the institutional strategic plan goals map to each core theme and its objectives. The evaluator committee was impressed by the widespread familiarity with the strategic plans, the commitment to the planning process, and the engagement with assessment processes.

In the *Year Seven Self-evaluation Report*, discussion of Standards 4.A.4, 4.A.5, and 4.A.6 was combined and did not specifically and clearly address holistic assessment of the alignment, correlation, and integration of programs and services with respect to the accomplishment of core theme objectives. Nonetheless, considering all of the available information, the evaluator committee sees evidence that alignment of programs and services does occur, particularly in the areas of student success and enrollment management. OSU has approached alignment of the efforts of multiple units by assembling broadly representative working groups, committees, or teams to address areas needing improvement. This approach seems to be effective, but these groups are not formally *assessing* alignment, correlation and integration, rather they are simply fostering it to the extent necessary to achieve progress.

In the report and other information reviewed, the evidence of holistic assessment and alignment and integration of programs and services is least apparent for core theme three. Given the broad set of activities, varied units, and extensive initiatives that fall under Outreach and Engagement at OSU, there was not clear evidence of holistic evaluation at the institutional level or, consistently, at the Division of Outreach and Engagement level. Within specific units, coordination and integration of initiatives was clearer. For example, during the site visit, evaluators learned of the reorganization of international programs into OSU GO (Global Opportunities, which supports the international experience of students and faculty) and International Affairs (manages data, agreements, visa requirements and paperwork for international students, and other essential international student support). The planning that went into that decision had the goals of better aligning international student support services with student affairs and promoting international experiences and study abroad with OSU GO. On nearly every indicator that measures growth or improvement, including both inputs and outputs, Outreach and Engagement is growing. There are more programs, more collaboration, more enrollments, more certificates, more start-ups and more initiatives that support the growth. However, there are not, within the core theme indicators of achievement or “Yardsticks”, identified thresholds for fulfillment of those goals. For that, the evaluator needed to reach back to SP3.0 and glean them from the points of alignment between core themes and strategic Benchmarks for Excellence, which were not always a neat fit.

**4.A.6** The evaluators could not discern evidence that there is a *regular* institutional review of assessment *processes*, except that the Academic Programs and Assessment Office is conducting regular reviews of student learning outcomes assessment reports. There was a reassessment and winnowing of indicators, and selection of “Yardsticks”, relative to the redefinition of mission fulfillment after the Year Three Review. The beginning of a new accreditation cycle, particularly given the pending change in accreditation standards, is an opportune time for a review of assessment processes and indicators and for establishing a schedule and process for regular review.

## **4.B Improvement**

**4.B.1** The *Year Seven Self-evaluation Report* included a well-done discussion of each of the indicators and what they are intended to describe. After the Year Three Evaluation, the long list of indicators (50+) was pared down to those most critical and reflective of progress around OSU goals. The chosen “Yardsticks” help create a story of progress, commitment to student success, and the willingness to ask hard questions through the assessment process to fuel improvement.

The Strategic plan goal — provision of a transformative educational experience for all learners, commitment to accessible learning opportunities, rigorous degree programs, supportive learning environment and innovative curricula — spurred the Undergraduate Student Success Initiative, efforts to recruit and retain an increasingly diverse student body, and rigorous, systematic and widespread assessment processes. The key elements in the Student Success Initiative are promising and OSU is encouraged to carefully analyze data, as it becomes available, to measure effectiveness of the Faculty Student Mentoring Program, the First Year Experience Courses, and Undergraduate Research programs that engage students in the first and second years. These programs and others have the potential for helping the institution fulfill its mission of providing a transformational education but need time to prove whether they are effective, sustainable, impactful, and relevant across the board and in the three main learning environments — Ecampus, Corvallis Campus and Cascades Campus. The initiative is relatively new, and the next few years will be critical in measuring impact.

OSU has seen steady increases in the total number of students, graduation and retention rates, and increasing diversity in its student body. The number of transfer and online students has increased as well, providing access for a broad range of students. There appears to be a widely shared sense of responsibility, across faculty, staff, administrators, and the students themselves, for the success of students. Importantly, the six-year graduation gap between non-underrepresented groups and underrepresented groups decreased from a 15.5% gap in 2010 to 9.8% gap for the 2011 cohort. The number of students with high college cost to family income ratio has increased from 27% to 30%, which will add new challenges to the student success efforts.

Efforts to support students with the first-year experience produced a two percentage point increase in retention. There was a strong sentiment among the deans that the first-year experience should be customized for students in different colleges or programs to address particular needs, rather than using a standard approach or being a requirement across campus. This response reflects the generally decentralized nature of OSU student success programs.

Several strong examples of innovative practices are described in the *Year Seven Self-evaluation Report* as well as other programs that are particularly promising for future impact. OSU received the WICHE Cooperative for Educational Technologies Outstanding Work Award in 2017 and a 2017 Online Learning Consortium Effective Practice Award and an Eduventures Innovation award for use of 3D Virtual Microscope and online introductory biology course. The URSA Engage Program engages first-and-second year undergraduates with a faculty mentor, with the aim to increase access for underrepresented groups, transfer students and first-generation college students, and achieved significant impact on retention (84.4 vs. 97%) and an increase in number of participants from 29 in 2015-16 to 116 during 2017-18.

Student Affairs has launched a campus-wide initiative to track engagement in Student Affairs programs, gathering data through card swipes. They have found that students who do at least two Student Affairs activities have an 86% retention rate rather than the average 84.4%, a promising area of analysis that can potentially help direct student success efforts in the future. The Campus Inclusivity Survey indicated a 10 to 12 percentage point rise for students who had two or more contacts with OSU representatives hoping to help them succeed. Allying Student Affairs and Office of Academic Achievement student retention efforts with the common goal of student success or degree completion reflects the campus-wide commitment to student success and a particular opportunity for collaboration around student success, as exemplified in retention and completion.

During the past year there was an increase in applications, but relatively flat numbers in terms of enrollment at Corvallis Campus. Ecampus and Cascades Campus enrollments increased, however, suggesting shifting enrollment patterns that present challenges in terms of guaranteeing the same quality of undergraduate experience, access to special programs like undergraduate research, and equivalent levels of support systems like advisors, learning assistants, and other programs designed to support students who struggle.

OSU is complimented on their efforts to engage students in the strategic planning and accreditation planning processes, creating genuine forums for gathering input and engagement in both goal setting and visioning activities. The Office of Academic Achievement – the principal academic unit for facilitating student learning outside the classroom – modeled the “spirit of inquiry” which similarly valued the input of students in their process of assessment, analysis, and improvement. Processes for sharing the results of surveys such as the Campus Inclusivity Survey or Advising Survey were informal,

but valued, and contributed to a greater understanding of what students want and need to meet their academic goals.

**Commendation:** The evaluator committee commends Oregon State University on its comprehensive planning to improve student success and on its numerous initiatives to provide strong academic support and positive out-of-class living and learning experiences, which are increasing retention and graduation rates even as enrollment has grown and diversified.

One area for improvement would be more central guidance and coordination around such key student success initiatives as peer educators, tutoring, the writing or math tutoring centers, universal tools or technologies, or undergraduate research that are backed up by student comments or feedback. Students are at times confused because of the variety of opportunities for supports that are offered across campus in colleges, through the Office of Academic Achievement, or in other units on campus, because of the decentralized nature of the services.

The OSU has identified, developed and measured 16 indicators of achievement to assess three objectives of core theme two. Fourteen of these indicators are quantitative and two are based on illustrative examples. The data presented are largely consistent, which allows assessment over time. As presented in the *Year Seven Self-evaluation Report*, the institution engaged with the indicators of core theme two, Research and Graduate Education, identified areas for improvement, developed strategies to address failures, and implemented initiatives for continuous improvement.

Ecampus certificates have grown steadily. That growth is shared across race/ethnicity, rural status, veteran status, and nontraditional age groups (indicator 3.1.1). PACE also has grown, but OSU data on certificate awards cannot yet be analyzed by participant category. Economic development and tech transfer activities have been more diffuse and so it is difficult to measure impacts. One notable measurement of success, presented during the site visit, is the persistence of 90% of startups begun in the accelerator over the past five years.

Most of the measurable indicators of achievement for core theme three have shown growth, some of it quite strong. Still, some of the indicators are less meaningful than others, in that they measure only inputs or are proxy measures that don't directly assess the objectives. OSU recognizes the need to address this.

**4.B.2** OSU invested in a structure to support and ensure that all academic units participate in a comprehensive assessment process, which includes full-cycle learning outcomes assessment, and has achieved 100% compliance for submission of annual reports. A culture of assessment been authentically created and perpetuated. We heard this commitment in meetings with constituent groups throughout the accreditation visit.

However, there is limited evidence that the assessment data are being used to inform academic and learning-support planning and practices that lead to enhancement of student learning achievements. This has certainly occurred in some programs, but the annual reports did not include strong evidence in a majority of cases. Note that the expectation is not simply that *changes* are made in programs. Changes (often beneficial ones) are made for a variety of reasons, including national trends, employer requests, faculty turnover, and so on. The expectation is that improvements are made that can be traced directly to conclusions about student learning based on assessment data, and further, that future assessment data show that the improvement has enhanced student learning. This "closing the loop"



does require considerable time and consistency of assessment approach, and it appears likely that OSU will have many more examples soon, as student learning outcomes assessment has become firmly established and universal.

Currently, student learning outcomes assessment reports submitted to the Academic Programs and Assessment Office are placed in a database (Sharepoint) that is not accessible to the public. Hence, prospective students, parents, and others with a reasonable interest in program student learning outcome assessment results do not have access to the information. Standard 4.B.2. sets the expectation that assessment results are publicly available, although it may be appropriate to present the information in a format different from the annual reports. For example, information might need to be aggregated or summarized to preserve student privacy rights.

**Recommendation, Standards 4.B.1, 4.B.2** The evaluation committee recommends that results of core theme assessments, particularly student learning outcomes assessment, are more consistently used for improvement by informing planning, decision-making, and allocation of resources and capacity. The committee further recommends that student learning outcomes assessment results are made available to constituencies outside Oregon State University in a timely manner.

## **STANDARD FIVE – MISSION FULFILLMENT, ADAPTATION, AND SUSTAINABILITY**

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### **5.A Mission Fulfillment**

**5.A.1** OSU has a long history of strategic planning and annual measurement and reporting of progress toward its goals. Regular and systematic assessment has mainly been based on the metrics selected to assess progress toward strategic plan goals. For Strategic Plan 3.0, which was in force through most of this accreditation cycle, the metrics included degrees awarded, graduation rates, retention rates for first-year students, enrollments of certain desired or underrepresented student categories, research and development expenditures, Ph.D. awards, invention disclosures, licensing revenues, Ecampus enrollments, public service research dollars leveraged per appropriated dollar, and annual private giving. These measures addressed aspects of all three core themes, and the evaluator committee saw and heard ample evidence that the data were widely available and used to inform planning, actions, and allocation of resources throughout OSU. Assessment has extended to finance and facilities. The OSU Board of Trustees has approved 10 metrics to track operations and monitor financial health.

Top-level measures have advantages, in that these data have often been routinely collected for many years, peer data are readily available for comparison, and they show progress if not always accomplishments, *per se*. However, there are some weaknesses, in that some important aspects of institutional goals are not assessed. Graduation does not necessarily show that the student has had a transformative education, for example, nor do research and development expenditures demonstrate leadership in research, scholarship, and creativity. There were few Strategic Plan metrics that assessed quality (Standard 5.A.2), except indirectly. For example, success in private fundraising or in securing external grants could be considered an indirect indicator of quality. Additional indicators, such as faculty publications, were used in core theme assessment, but it is not clear that those indicators were as widely disseminated and reflected upon. Nonetheless, in the experience of the evaluators, OSU provided more evidence than most institutions that it is fulfilling the requirements of Standard 5.A.1.

**5.A.2** OSU identified 17 mission fulfillment “Yardsticks” to provide measures of the university’s mission fulfillment, as well as to support continuous improvement and drive performance toward aspirational goals. OSU met its goals in terms of research and development expenditures, total degrees awarded, six-year graduation rates, and an increase in diverse students. It did not meet its aspirational goal of 88% first-year student retention to the second year but improved to 84.4%. The graduation rate gap between underrepresented and non-underrepresented students decreased from 15.5% to 9.8% for the 2010 and 2011 cohorts. Both retention and completion of underrepresented students have been steadily improving. OSU clearly succeeded in meeting its definition of mission fulfillment. It is impressive that OSU demonstrated progress on so many of its “Yardsticks”.

The *Year Seven Self-evaluation Report* is posted on the public University Accreditation website, so it is accessible to anyone. It was actively distributed to the Board of Trustees and faculty (via the Faculty Senate). Faculty, staff, and students were informed of the report and the Accreditation website and given opportunities for discussion at open meetings. Annual reports of Strategic Plan 3.0 metrics were prepared and posted on the Strategic Plan website, as well as being presented to the Board of Trustees and distributed widely within OSU. Data reports based on those measures were also prepared for each College. Strategic Plan 4.0 metrics have been expanded and annual reporting will commence in July 2019. In the opinion of the evaluators, this is adequate communication of mission fulfillment to OSU constituencies and the public, although it is not labeled as such.

## **5.B Adaptation and Sustainability**

**5.B.1** OSU is committed to sound financial management and regularly evaluates the adequacy of its resources and capacity. The university utilizes a 10-year business plan, composed of a 10-year capital forecast and a 10-year operational forecast, which is approved by the Board in even-numbered years. These forecasts identify key fiscal and facilities challenges and opportunities including cost drivers like PERS (Public Employee Retirement System) increases and a backlog of deferred maintenance. OSU’s Office of Budget and Fiscal Planning works closely with enrollment management on a multi-year enrollment projection based on varying student characteristics, program level, and delivery mode/location. Enrollment projections are particularly important as a larger portion of revenue than in the past is from tuition.

**Concern:** To ensure achievement of intended goals and objectives, OSU’s financial and capital evaluation and planning should continue to address and adapt to changing needs in response to the growth in Ecampus, stable enrollment at Corvallis, development of OSU-Cascades, and expansion of the Hatfield Marine Science Center.

**5.B.2** OSU’s cycle of planning, strategic actions, resource allocation, application of institutional capacity, and assessment of results is well-documented and has been sustained throughout this accreditation cycle. Planning has been carried out every five years during President Ray’s tenure, and with each iteration, goals, strategies, and metrics have been changed based on institutional performance and external conditions.

OSU’s recent implementation of a shared-responsibility budget model for the educational and general funds budget for Corvallis Campus demonstrates the use of assessment results and their application to resource allocation and institutional capacity. This new model is a hybrid responsibility-centered management model, with budget allocations to academic units linked to measures such as student credit hours, research activity, and degrees awarded.

OSU has identified significant deferred maintenance and capital renewal needs on the Corvallis campus. To address these needs, an annual funding source of \$45 million is being created (\$5 million additional allocation each year until the target is reached). In addition to this investment in deferred maintenance, a stewardship fund has been initiated as part of all new major capital projects to support the replacement of major building systems.

**5.B.3** The OSU 10-year Business Plan is exemplary in terms of consideration of the financial impacts of internal and external conditions and their foreseeable changes. Leading up to the process that led to Strategic Plan 4.0, OSU developed the “VISION 2030: Distinction, Access and Excellence” document. This effort sought to anticipate OSU’s future, unique contributions in higher education, considering both its internal resources and the state, national, and international context. VISION 2030 provided a longer-term perspective to inform the development of Strategic Plan 4.0.

OSU is in the process of creating a new Strategic Framework Plan with the aid of an external consultant. This new plan will guide the development of the campus over the next decade, including the annually updated 10-year Capital Forecast. The Division of Information and Technology is developing a new strategic investment plan for 2019-21 with a cloud-first strategy reflecting the evolving environment of technology systems, infrastructure, access, and security.

## SUMMARY

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Oregon State University is a very successful public research university that has improved its performance significantly during the period under review. Enrollments, retention of first-year students, and graduation rates have increased as the student body has become increasingly diverse. Student learning outcomes assessment has become well-established. Total research and development funding awards were nearly \$100 million greater in FY18 than in FY14. The percentage of faculty with at least one national or international refereed publication has increased as well. Ecampus and Professional and Continuing Education enrollments, degrees awarded, and noncredit certificates awarded have grown dramatically. Through robust planning and forecasting, as well as its achievements over the past decade, OSU has demonstrated that it is capable of adapting to change in order to assure its continued success.

**Commendation:** The evaluator committee commends Oregon State University on its commitment to the Land Grant mission of providing broad access to educational opportunities for individuals from all backgrounds, including development of quality online courses and programs; educational outreach to underserved communities; the use of Extension facilities and services to reach across the State of Oregon; and collaborations with communities and community colleges.

## COMMENDATIONS AND RECOMMENDATIONS

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**Oregon State University**  
**Year Seven Mission Fulfillment and Sustainability Evaluation**  
**April 15-17, 2019**

### Commendations

The evaluator committee commends Oregon State University on the design of its websites, which makes it particularly easy and intuitive for prospective students and others to find needed information.

The evaluator committee commends Oregon State University for taking steps to allocate substantial resources to address needed repair and renovation of facilities on the Corvallis Campus.

The evaluator committee commends Oregon State University for developing a robust culture of planning, including regular strategic planning and well-integrated planning for multiple levels and time periods.

The evaluator committee commends Oregon State University on its comprehensive planning to improve student success and on its numerous initiatives to provide strong academic support and positive out-of-class living and learning experiences, which are increasing retention and graduation rates even as enrollment has grown and diversified.

The evaluator committee commends Oregon State University on its commitment to the Land Grant mission of providing broad access to educational opportunities for individuals from all backgrounds, including development of quality online courses and programs; educational outreach to underserved communities; the use of Extension facilities and services to reach across the State of Oregon; and collaborations with communities and community colleges.

### Recommendations

**Standard 1.B.2.** The evaluator committee recommends that Oregon State University identifies indicators of achievement that form a more meaningful basis for evaluating the accomplishment of its objectives.

**Standard 2.C.3.** As Oregon State University expands its Ecampus, Cascades Campus, and other extended sites, the evaluator committee recommends that the university continues to exercise great care that credit and degrees, wherever offered and however delivered, are based on documented student achievement of the established Oregon State University learning outcomes.

**Standards 4.B.1, 4.B.2.** The evaluator committee recommends that results of core theme assessments, particularly student learning outcomes assessment, are more consistently used for improvement by informing planning, decision-making, and allocation of resources and capacity. The committee further recommends that student learning outcomes assessment results are made available to constituencies outside Oregon State University in a timely manner.