

# LEVERAGING OUTCOMES-BASED FUNDING TO SUPPORT EQUITY

## MODULE 4.3 Case Study of Western Oregon University: Shifting Directions to Improve Equity

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**THE OBF EQUITY TOOLKIT** provides practical lessons on how states, systems, and institutions work to address equity in the development and implementation of OBF policy. Broken into four Series focused on equity challenges in distinct phases of the OBF policy process, the Toolkit contains short, individual modules that focus on specific topics and provide lessons learned and recommendations for policymakers and institutional leaders to consider. Content is derived from in-depth study of six states (Tennessee, Indiana, Ohio, New Mexico, Oregon, and Kentucky) and 13 institutions in them. See the Research Methods section of the Overview for more information.

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### Module Goals

This module addresses equity at the institutional and student levels as outlined in our OBF Equity Overview, focusing on an institution in the context of a state which has used an Equity Lens<sup>i</sup> to inform all sectors of education funding, including its OBF policy. It provides policy makers and institutional leaders a case study of how one regional university in this equity-focused state:

- Aligned leadership activities to increase focus on completion and the outcomes-based funding policy;
- Revised academic requirements and added new programs in response to the policy;
- Improved student success supports; and
- Is seeing early signs of improved student performance.

See Module 1.5 Oregon State Profile for more detailed information on Oregon's OBF policy.

### EQUITY CHALLENGE

#### Shifting institutional efforts to better support underserved students

Many institutions in states that have adopted OBF policies struggle to increase student completion, particularly among low-income students and students of color. This module highlights Western Oregon University (WOU) because it succeeded in improving completions for these students and aligned academic programs to priorities set out in the OBF policy.

WOU plays an important role in efforts to close Oregon’s achievement gaps and bring college access to rural students. Like many rural institutions, it serves a higher percentage of low-income and minoritized students than the state’s four-year research institutions. Table 1 provides an overview of WOU’s student body.

**Table 1. Western Oregon University Student Profile<sup>ii</sup>**

ENROLLMENT	FULL-TIME	PART-TIME	AGE 25 <	PELL
5,336	85%	15%	15%	44%
HISPANIC/LATINO	WHITE	ASIAN	AFRICAN AMERICAN	AMERICAN INDIAN
16%	61%	5%	4%	2%

## Overview of Oregon’s 2018 OBF Policy

Percent base allocation: 60%  
Sector affected: Public 4-year universities

Metrics:

- Student credit hours
- Degree completions (BA/BS through PhD)
- STEMH+ degree completions
- Degree completion for priority populations (low-income, minoritized, rural, and veteran students)

**Policy also includes** resources for dual credit completions and funding to recognize different missions. **For more information,** see Module 1.5: Oregon State Profile.

## LESSONS FROM THE FIELD

WOU is a public, mid-sized university located 20 miles from the capital city of Salem, Oregon. It was founded in 1856 and in 1882 it became a state-sponsored teacher training, or “normal” school. Until 1981, when the school added liberal arts and sciences degrees, the institution was focused exclusively on education.<sup>iii</sup> Located in a rural Oregon town, the institution manages to attract and retain high numbers of students of color, and is recognized as a leader in supporting veterans and students with disabilities. WOU provides many lessons for bolstering efforts to support underserved students. Institutional leaders participated in the policy development process, as described in Module 2.1 Case Study of Oregon: Integrating Equity in OBF Formula Design. WOU also initiated a host of campus reforms and are seeing promising improvements in student retention and outcomes.

## Equity-focused campus implementation

WOU engaged in a range of activities to support campus response to OBF and address equity issues. Efforts can be broadly bucketed around leadership, academic, and student success changes:

### Leadership

**Strategic planning.** Coinciding with OBF, WOU inaugurated a new president, signaling an opportune time to revisit the institution’s strategic plan. Forward Together<sup>iv</sup>, WOU’s 2017-23 strategic framework, aligns to the state’s equity-focused OBF policy through an emphasis on the following student completion initiatives:

- Streamlining academic pathways including revising General Education;
- Improving academic advising;
- Strengthening WOU's commitment to diversity; and
- Increasing student engagement through high impact activities.

**Increased conversation and focus on student completion and targeted equity populations.** Leaders and administrators across the campus reported that OBF shifted campus conversations from enrollment to completion. One institutional leader explained how the OBF policy supported his argument to improve student success, stating, "Even in the absence of a outcomes-based funding model, I might have come in and said our retention and graduation rates need to be better, but frankly, the existence of that funding formula gave me a larger platform from which to say, 'There's no debate about this, folks'." This institutional leader also described widespread buy-in to serving the equity populations identified in the OBF policy, stating, "In terms of the conversations I've had locally and in the State House, there's been no debate about it. The focus on rural, low-income, veteran, and underrepresented minority students is accepted as what we should be thinking about."

## Academic

**Added academic programs in alignment with Oregon's OBF policy priorities.** Within four years of OBF implementation, WOU created a range of programs that support OBF priorities. One example is the policy's focus on bilingual educators. In 2015 WOU created the Bilingual Teacher Scholars Program<sup>v</sup> to help diversify the educator workforce in the state. Students participating in the program receive a scholarship, individualized advising, and professional development opportunities. WOU has also added new STEM and healthcare focused degrees and certificates, which are also priority degree areas in the OBF policy. In addition, WOU created multiple graduate certificates and plans to add doctoral level occupational therapy and physical therapy programs.

**Revised and streamlined general education requirements.** To ensure that general education requirements were not a barrier to completion, WOU reduced the number of required courses and simultaneously expanded the scope of classes that count in each academic field so that students have more options within each discipline. This reduces the likelihood that students will not be held up by waiting for a seat in a specific high-demand class and are able to select courses that match their interests. Another critical element in the revision was the addition of 30 elective credits that allow students greater flexibility to engage in a wider range of intellectual pursuits.

**Clarified degree pathways.** WOU made additional efforts to ensure that recommended degree pathways are published online to improve student awareness of course sequencing.<sup>vi</sup> WOU also dropped the requirement that students declare a minor and ensured that all degrees are achievable in four years or 180 credits (the equivalent of 120 credits at many other institutions). The final part of the revision to the degree redesign was the requirement that all major-required coursework fit within 60 credits (note WOU is on the quarter system).

**Improved academic pathways from high schools and community colleges to WOU.** WOU helped create the Willamette Promise<sup>vii</sup> to provide underserved high school students with the opportunity to earn college credits for \$30 per year. College level courses are taught in local high schools, and students can transfer the courses to an Oregon institution of their choice. In 2017-18 2,645 students from 56 high schools earned 16,011 credits. WOU has also expanded and updated transfer agreements with all community colleges in the state, and increased the number of co-enrollment agreements, to ensure that students who begin their academic career at a community college have a clear path to transfer.

## Student Success

**Increased focus on enrolling targeted student populations.** Leaders at WOU reported increased efforts to recruit Hispanic and veteran students in response to the OBF formula, which rewards institutions who retain and graduate these students. One institutional leader explained, “We never used to target [students] in this way before. Then when the outcomes-based formula began it was very explicit at meetings that we were mentioning these groups.” To aid in this effort, WOU hired bilingual admissions recruiters and financial aid counselors, and has hosted the annual César E. Chávez Leadership Conference (CECLC)<sup>viii</sup> which brings 2,000 high school students of color from the surrounding communities onto the campus.

**Expanded supports for first generation, low-income and students with disabilities.** The Student Enrichment Program (SEP)<sup>ix</sup> was a longstanding TRIO Student Support Service that WOU began supplementing with institutional funds after OBF was implemented. SEP was relocated into a renovated and more centrally located building, and academic advisors and additional student support tools were added to the program. Institutional leaders applauded the success of the program, but recognize it is also in need of additional funding as it can only serve about 600 of the 2,300 eligible students. Students must apply to participate. Selected students receive services such as academic advising, tutoring, summer bridge programs, financial aid grants and career advising, among other services. WOU is also pursuing Hispanic Serving Institution (HSI) status to increase the resources available to support Hispanic students.

**Improved advising and supports for all students.** WOU serves a high percentage of students that fall within Oregon’s OBF target populations, but not all are eligible to participate in SEP. To meet the needs of all students, WOU has increased student success supports through expansion of their Student Success Center, hiring new and bilingual general academic advisors, and creating a veteran student outreach center. WOU also adopted intrusive advising technology. The Wolf Connection System<sup>x</sup> is a comprehensive student success system that allows faculty to identify students that need additional supports and flags them for an intervention from the Student Success and Advising Office. Student can also use the system to view their schedule, calendar, notes from previous advising appointments, and to contact their professors with one-click to communicate an absence or illness.

**Encouraged Hispanic and Latinx student leadership.** IN 2017 WOU transitioned from the host of the César E. Chávez Leadership Conference (CECLC)<sup>xi</sup> to the managing partner. The conference, which was founded in 1990, brings together over 2,000 Hispanic and Latinx high-school students to help develop leadership skills and encourage college-going for the purpose of greater social justice and civic responsibility.

**Created a Director of Degree Completion position.** Housed in the academic affairs department, the newly created Director of Degree Completion uses institutional data to identify students who are close to degree completion and personally reaches out to them to ensure they are on track to graduate.

**Shifted financial aid dollars to encourage completion.** WOU diverted financial aid dollars that were previously used for student recruitment to tuition, fee, and housing remissions to encourage current students to complete. Institutional leaders reported that while “fee remissions have always been around,” the institution is now strategically using remission dollars to support low-income, Hispanic, and veteran students, as well as supporting students close to completion.

## Early equity-focused outcomes

**WOU reports that recent data on student outcomes shows improvement.** Oregon’s OBF policy in is in the early years of implementation, so additional years of student data are needed to determine if the policy has been effective. However, institutional leaders report that the following outcomes have improved:

- First-year retention improved from 69.3% to 74.1%<sup>xii</sup>
- Minority enrollment increased by 18.5%
- Latino student enrollment increased from 9% to 15.6%
- Number of master's degrees increased by 3%

## THE TAKEAWAY

An equity focused OBF policy coupled with additional state funding can provide institutions with the incentive and resources to improve efforts to support underserved students. The following takeaways from the experience of WOU may be helpful to other campuses:

**Ensure strategic plans and leadership conversations are explicitly focused on completion and equity populations.** Oregon's OBF policy has a stronger focus on equity populations than policies in many other states. In states with a weak focus on underserved students, institutional leaders can bolster underserved student completion by ensuring that strategic plans include an explicit commitment to equity and that institutional conversations and efforts stay centered around underserved students.

**Audit degree requirements to reduce barriers to completion, and ensure that students are well informed regarding requirements.** Reduce the number of courses that may be unnecessary for a student's future career pursuits and ensure bachelor's degrees can be completed in a reasonable amount of time. Communicate degree requirements to students frequently and consistently.

**Systematically analyze institutional practices to identify where resources and efforts can be shifted to support completion.** Institutional leaders may find that staff positions and institutional resources like financial aid can be altered with minimal effort to better support completion.

**Expand opportunities and supports for underserved students along the entirety of their college journey.** From encouraging a college-going culture at local high schools to offering last-semester housing and fee remissions, there are multiple opportunities for institutions to better ensure underserved student success.

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i Oregon Higher Education Coordinating Council. "Oregon Equity Lens". <https://www.oregon.gov/highered/about/Documents/Commission/COMMISSION/2017/08-August-9-10/4.0d%20Equity%20Lens-reformat.pdf>

ii National Center for Education Statistics. "College Navigator." 2018. Distributed by National Center for Education Statistics. <https://nces.ed.gov/collegenavigator/?q=western+oregon+university&s=all&id=210429#enrolmt>.

iii "Western Oregon University". 2018. [https://oregonencyclopedia.org/articles/western\\_oregon\\_university/#.XFSjktJKJlU](https://oregonencyclopedia.org/articles/western_oregon_university/#.XFSjktJKJlU).

iv Western Oregon University. "Forward Together 2017-23: WOU's Strategic Framework." 2017. <http://www.wou.edu/planning/files/2016/05/Forward-together-booklet-web.pdf>

v Western Oregon University. "The Bilingual Teachers Scholars Program." Accessed January 8, 2019. <http://www.wou.edu/teachered/bilingual-teacher-scholars/>

vi Western Oregon University. "Academics." Accessed January 8, 2019. <http://www.wou.edu/academics/>

vii Western Oregon University. "The Willamette Promise." Accessed January 8, 2019. <https://www.wesd.org/willamettepromise>

viii Western Oregon University. "César E. Chávez." Accessed January 8, 2019. <http://www.wou.edu/ceclc/>

ix Western Oregon University. "Student Enrichment Program." Accessed January 8, 2019. <http://www.wou.edu/sep/about-sep/>

x Western Oregon University. "Wolf Connection System." Accessed January 8, 2019. <http://www.wou.edu/advising/wolf-connection-system/>

xii Western Oregon University. "Institutional Research." Accessed January 8, 2019. <http://www.wou.edu/institutionalresearch/retention/>