

# **Oregon State University College of Business**



## **FY21 Strategic and Financial Plan**

**January 29, 2020**



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## Overview

All business degree programs within the university are accredited by the Association to Advance Collegiate Schools of Business (AACSB). The fundamental purpose of AACSB accreditation is to encourage business schools to hold themselves accountable for improving business practice through scholarly education and impactful intellectual contributions. AACSB achieves this purpose by defining a set of criteria and standards, coordinating peer review and consultation, and recognizing high-quality business schools that meet the standards and participate in the process. The College manages this accreditation process which requires annual reporting on mission accomplishment and Continuous Improvement Review (CIR) visits every five years. A CIR visit is currently scheduled for May 2020.

The mission of the College is four-fold:

- *Educational mission:* We provide transformative educational experiences that produce highly competent, ethical and engaged future leaders who strive to make a difference.
- *Research mission:* We conduct leading-edge research focused on relevant and important business and societal challenges.
- *Engagement mission:* We engage in our communities and work collaboratively to contribute to economic development, social progress and prosperity.
- *Diversity, Equity and Inclusion mission:* We create a culture of belonging and community that values and respects differences so everyone feels welcome.

The College is guided by four overarching strategic initiatives: (1) **student success**, (2) **faculty excellence**, (3) **external engagement** and (4) **inclusive excellence**. Our strategic initiatives are reviewed and revised annually.

The College has a committed faculty; effective internal systems for enrollment, marketing, and recruitment; prominent faculty members with international reputations; a strong base of loyal alumni and supporters; and efficacious external engagement initiatives.

The College expects continued decline in the number of first-time, first-year students progressing from high school to the Corvallis campus. We expect to offset this decline with targeted marketing and recruiting to Oregon Community Colleges to increase enrollments by transfer students in Corvallis, Portland and online. In partnership with INTO OSU, we expect international enrollments in Corvallis graduate programs to remain steady. In partnership with Extended Campus, we expect to grow enrollments in our Portland and online graduate programs.

Based on past and expected growth, the College plans to hire professorial faculty within growth disciplines and expand our faculty and staff devoted to our integrated recruiting and marketing initiatives.

## Strengths, Opportunities, Challenges and Threats

Table 1 provides a summary of the strengths, opportunities, challenges and threats facing the college. Details on each factor are provided at [Appendix G](#).



<b><u>Strengths</u></b>	<b><u>Challenges</u></b>
<p data-bbox="203 315 397 346"><b>Student Success</b></p> <ul data-bbox="251 367 917 766" style="list-style-type: none"><li>• Student Engagement via Blueprint</li><li>• Experiential Learning</li><li>• Integrated Professional Development and Career Success Center</li><li>• Academic Performance Interventions</li><li>• Financial Hold Interventions</li><li>• Coordinated Academic Advising and Student Engagement Teams</li><li>• Strong entrepreneurship programming for students university-wide through InnovationX, the Center of Excellence for Innovation and Entrepreneurship</li></ul> <p data-bbox="203 840 462 871"><b>External Engagement</b></p> <ul data-bbox="251 892 803 924" style="list-style-type: none"><li>• Volunteer, Donor and Alumni Engagement</li></ul> <p data-bbox="203 976 422 1008"><b>Faculty Excellence</b></p> <ul data-bbox="251 1029 909 1239" style="list-style-type: none"><li>• Strong international reputations of our prominent faculty</li><li>• Performance evaluation systems that advance faculty excellence</li><li>• Faculty and Staff Development Committees</li><li>• Teaching Excellence</li></ul> <p data-bbox="203 1312 438 1344"><b>Inclusive Excellence</b></p> <ul data-bbox="251 1365 917 1680" style="list-style-type: none"><li>• DEI Training for COB faculty/staff and our employers</li><li>• Center for the Advancement of Women in Leadership programming for COB faculty/staff, OSU students and the community</li><li>• DEI Advocate Program</li><li>• Established College-level processes and systems for enrollment marketing and recruiting (graduate and undergrad)</li></ul>	<p data-bbox="941 315 1031 346"><b>Overall</b></p> <ul data-bbox="990 367 1388 514" style="list-style-type: none"><li>• OSU Cascades</li><li>• Budget Model</li><li>• Lack of Integration Across Technology and Data System</li></ul> <p data-bbox="941 567 1136 598"><b>Student Success</b></p> <ul data-bbox="990 619 1372 714" style="list-style-type: none"><li>• Lack of scholarships for high-achieving and high need students</li></ul> <p data-bbox="941 787 1161 819"><b>Faculty Excellence</b></p> <ul data-bbox="990 840 1421 1081" style="list-style-type: none"><li>• Accounting Faculty</li><li>• Lack of Funds for Faculty Fellowships, Professorships and Chairs</li><li>• Lack of Faculty Expertise in Areas that Connect to Other OSU Strengths</li></ul> <p data-bbox="941 1155 1177 1186"><b>Inclusive Excellence</b></p> <ul data-bbox="990 1207 1396 1522" style="list-style-type: none"><li>• Lack of Integrated Recruiting and Enrollment Management</li><li>• Unique Baccalaureate Core Requirements</li><li>• In-state and Proximate Competitors with Better Enrollment Management Processes and Financial Aid Packages</li></ul>



<u>Opportunities</u>	<u>Threats</u>
<p>Student Success</p> <ul style="list-style-type: none"> <li>• Expand High Achieving Student Initiatives</li> <li>• Covering the Gap for High Need COB students through Scholarships.</li> <li>• Provide Financial Literacy Education.</li> </ul>	<p>Student Success</p> <ul style="list-style-type: none"> <li>• Threat – Incoming International Exchange</li> </ul>
<p>Faculty Excellence</p> <ul style="list-style-type: none"> <li>• College Restructure to Schools</li> <li>• Advancing a Culture of Research Excellence</li> </ul>	<p>Faculty Excellence</p> <ul style="list-style-type: none"> <li>• Delayed Hiring of Professorial Faculty</li> </ul>
<p>External Engagement</p> <ul style="list-style-type: none"> <li>• Expand Continuing and Professional Education</li> <li>• Restructure Austin Family Business Program</li> <li>• Expand K-12 Outreach</li> </ul>	<p>External Engagement</p> <ul style="list-style-type: none"> <li>• OSU PACE</li> </ul>
<p>Inclusive Excellence</p> <ul style="list-style-type: none"> <li>• Expand DEI Successes in Student Programs, including expanding programming and curricular practices to retain underserved populations</li> <li>• Expand Undergraduate Recruiting Team and focus recruiting efforts on underserved populations</li> <li>• Expand Domestic Recruiting for Online Graduate Programs</li> <li>• Expand International Recruiting to All Graduate Programs</li> <li>• Expand COB leadership and scholarship on DEI through continued faculty/staff professional development (e.g., expanding inclusive hiring training) and investment in research</li> </ul>	

Table 1. Summary of Strengths, Opportunities, Challenges and Threats.

**Strategies and Actions to Advance the College**

- Preeminence in Research, Scholarship and Innovation (SP 4.0 Goal I). The College will continue to strive to achieve distinction through the expertise and impact of our faculty through their scholarly and applied work.
  - Build Research Clusters within Schools and Centers of Excellence. The transition to the School model within the College, as well as the creation of Centers of Excellence that incorporate research and scholarly activity, offer opportunities to create vibrant research communities



composed of academic researchers working within and across business disciplines<sup>1,2</sup>.

- Expand Recognition for High Impact Scholarship. As discussed in the opportunities section in [Appendix G](#), the College will continue to invest in research awards and grants to support faculty research initiatives and to provide recognition for outcomes and will also begin tracking and rewarding editorships and editorial board memberships<sup>3</sup>.
- Execute the Hiring Plan to Add Professorial Faculty. Budget issues need to be resolved such that all revenue generated by growth flows to the College so that we can hire professorial faculty in those growth disciplines.
- Transformative Education that is Accessible to All Learners (SP 4.0 Goal II). The College will continue to use multiple locations and modalities to deliver distinctive and affordable business education while also integrating the Blueprint model in all undergraduate educational programs to enhance personal, professional and leadership skill development and financial literacy of all graduates.
  - Provide Distinctive Curricula. The College will regularly explore additional degrees, options, certificates and minors, both undergraduate and graduate, as warranted by the market. The College is actively collaborating with other OSU academic units to develop strategic partnerships and joint and interdisciplinary degree programs. The College is also exploring the use of stackable certificates at the graduate level, and linking professional and executive education graduate program opportunities.<sup>4</sup>
  - Increase Experiential Learning Opportunities. The College will continue to expand opportunities for students to engage in experiential learning. The College operationalizes experiential learning broadly, including participating in major events or conferences, case/pitch competitions, applied projects, field trips, international experiences, workshops, internships, etc. The College has achieved the goal of 100% student participation in at least one experiential learning activity per year across all four years of the curriculum through implementation of initiatives like Fridays in Austin, microenterprise projects in the first year program, Learning Labs, Travel Fridays, ethics case competition in the third year program, and capstone projects.<sup>5</sup>
  - Implement an Integrated Approach to Recruiting. To improve market awareness, we established a recruiting team. Recruiting staff are located in Portland and Corvallis. The recruiting team actively engages with central to try to improve overall communications flow, messaging and recruiting processes that best feed the College programs. The recruiting team maintains regular presence at regional Community Colleges, providing current articulation tables, delivering coursework, and building relationships for referrals.<sup>6</sup>
  - Increase Retention and Graduation Rates. We will continue to streamline our curricular

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<sup>1</sup> SP 4.0 Action 3: Diversity our research portfolio and strategically build our graduate programs

<sup>2</sup> SP 4.0 Action 6: Substantially improve our physical and administrative research infrastructure

<sup>3</sup> SP 4.0 Action 1: Continue attracting and supporting a diverse, world class faculty

<sup>4</sup> SP 4.0 Action 2: Provide distinctive curricula and support innovative pedagogy to advance our mission and vision

<sup>5</sup> SP 4.0 Action 7: Increase and ensure access to experiential learning opportunities

<sup>6</sup> SP 4.0 Action 5: Implement an integrated approach to recruiting and enrolling learners at all levels



offerings and implement the Blueprint model to increase retention and graduation rates. Metrics indicate improvement in retention noting fewer students leaving the college to pursue other OSU majors, increased fall-to-winter retention: 93.4% (2016) to 95.6% (2018), and increased spring-to-fall retention to a business major: 86.1% (2016) to 95.7% (2018).<sup>7</sup>

- *Strengthen Support System for Innovation and Entrepreneurship.* Continue to evolve the Center of Excellence for Innovation and Entrepreneurship (InnovationX) (see [Appendix J](#)). The mission of InnovationX is to support students of all majors across OSU as they work to turn their startup ideas into reality. Center activities include: promoting awareness to identify prospective students with entrepreneurial ambition; providing programming to allow these audiences to participate and engage in entrepreneurship; and accelerating entrepreneurial success.<sup>8</sup>
- *Continue Degree Completion Initiatives for Community College Transfer Students.* The College currently employs two Recruiting/Program managers who travel to community colleges to provide program information and academic advising for our degree completion programs. All incoming transfer students, both in Corvallis and online, take a transfer-student only section of the professional development class to build community and are assigned a peer mentor to assist in the transition to OSU.<sup>9,10</sup>
- *Expand our Economic Impact (SP 4.0 Goal III).*
  - *Increase Internship Opportunities for Students.* Using our Career Success Center and our External Engagement teams, partner with industry to increase the availability of career-focused internships to prepare profession-ready graduates. It is our goal that every OSU College of Business graduate is ready to make an immediate, meaningful impact for the organizations that employ them and for the communities they call home.<sup>5</sup>
  - *Establish Center of Excellence for Family Enterprise.* Expand the current Austin Family Business Program to become the prominent resource for family enterprises and the advisers that support their success. (See [Appendix K](#))
- *Advance Diversity Equity and Inclusion Initiatives (SP 4.0 Goal IV).*
  - *Develop a Strategic Plan for Advancing Diversity, Equity and Inclusion (DEI).* Led by the Center for the Advancement of Women in Leadership and in collaboration with the faculty and staff development committees, the DEI committee within the College, and the Office of Institutional Diversity, develop a comprehensive DEI strategic plan to support the long-term success of our professorial and professional faculty and staff.<sup>11</sup>
  - *Integrated Recruiting and Marketing and Communications.* Continue to grow our recruiting teams and integrate with our Marketing and Communications activities to increase awareness of degree completion programs to under-served and place-bound populations.<sup>4,11</sup>

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<sup>7</sup> SP 4.0 Action 11: Increase our retention and graduation of all students

<sup>8</sup> SP 4.0 Action 15: Strengthen our support system for innovation and entrepreneurship

<sup>9</sup> SP 4.0 Action 4: Retool the OSU experience for the 21<sup>st</sup> century learner

<sup>10</sup> SP 4.0 Action 8: Expand pathways to an OSU education

<sup>11</sup> SP 4.0 Action 10: Integrate inclusive excellence principles and practices into all aspects of the university

## Financial Planning for FY21

- 1-3 Year Outlook and Non-recurring Program Requests

- The College takes the view that we need to increase our capacity to market and compete effectively to attract new students. The demographics of the state show clear growth in select segments. The College will focus on the growth segments for current and future revenue generation, with an emphasis on degree completion programs for place-bound community college students. As shown

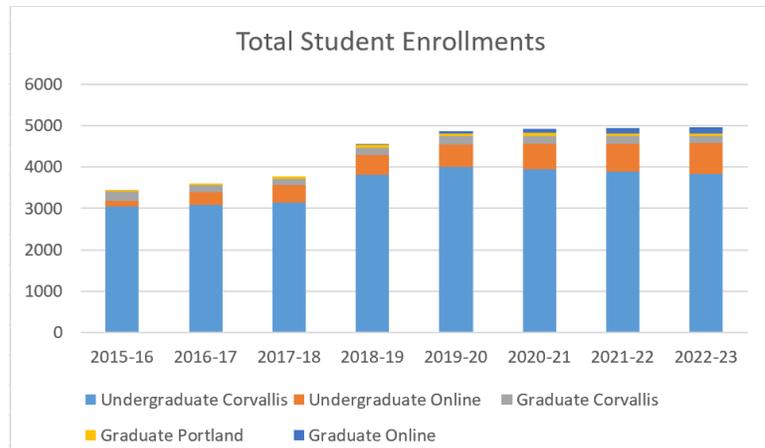


Figure 1. Projected Student Enrollments through FY23

in [Appendix D](#), we expect the on-campus population of students to decline while the population of online students will grow, resulting in an approximately steady population of enrolled students across all locations and modalities at 5,000 students (see Figure 1).

- See [Appendix E](#) for the financial forecasts for FY21, FY22, and FY23 based on enrollment projections. The key assumptions underlying the College forecasts are that the “shared pool” in the university budget model will not add additional hidden taxation to the College, and model budget projections based on SCH and completion rates will be funded (no holdbacks for too much growth).
- 5 Year Forecast discussion
  - The College has grown its enrollment approximately 44% since 2015. Over the next five years, the College should maintain a total (undergraduate and graduate) enrollment of about 5000 degree-seeking students, but shifting to serving an increasing population of online students. This scale is important for efficient operations, which includes providing access to courses and course sequences nearly every term so that graduation is not delayed. This scale also entails efficient utilization of faculty (teaching courses of optimal size) and facility (Portland and Corvallis).
  - To advance its reputation, the College needs to continue investing in faculty excellence, as well as selective hiring and promotion. The pace at which the College can do this is dependent on enrollment, philanthropy or other revenue generation. If we are successful, in five years the college rankings will have risen and the ability to recruit (faculty and students) will also increase. Regardless of scale or pace, the College will stay on track emphasizing faculty excellence. We have successfully reset the College research standards to a normal level of excellence for our peer group and we have no plans for change (See [Appendix P](#): College of Business Metric-Based Performance Evaluation System).
  - If the short-term plan for continuing and professional education is successful, the College will



be able to generate additional revenue to invest in our strategic initiatives.

- Cost or program reductions
  - The College regularly assesses Return On Investment (ROI) on all initiatives and makes adjustments annually. Lower ROI activities will be cut where possible. Cost reductions will be absorbed through the following measures:
    - Combine sections of courses that are not at maximum capacity.
    - Continuous evaluation of program cost and enrollment to make responsible decisions about course and program longevity.
    - Aligning staffing of courses and all functions with available budget.
    - Align expenditures on all activities with ROI.
    - Manage all faculty hires and replacements according to AACSB ratio requirements.

### **Hiring Plans for FY21**

The College hiring plan is outlined in [Appendix E](#). These faculty hires are aligned with program enrollment growth and they are necessary to maintain required AACSB ratios of academically qualified faculty.

- Dean.
  - The College needs new leadership who can continue our strive for excellence in all that we do.
- Academic and Instructional Faculty:
  - For FY20, the College is moving forward with hiring professorial faculty in Marketing, Business Analytics, and Finance. The College continues to defer hiring professorial faculty in the areas of Accounting, Management, Business Information Systems, Apparel Design, Design and Innovation Management, and Interior Design.
  - One of the requirements to maintain our AACSB accreditation is that 60 percent of our FTE that deliver coursework must have a doctoral degree (PhD, JD, DBA, etc.) and maintain academic or professional qualifications. To absorb the lag in the budget model allocations over the past few years, we had delayed replacing tenure/tenure-track lines and have instead opted to use fixed-term instructors to deliver the additional course sections needed to meet student demand. We took this approach with the expectation that the budget model would eventually catch up (overcome the three-year lag) and we would be able to hire the professorial faculty needed to maintain accreditation ratios.



- For our year of self-study for our upcoming AACSB re-accreditation visit, FY 19 (2018-19 -orange bar in Figure 2), the College met those FTE requirements in all areas except the general Business Administration major. The slight dip below the 60 percent minimum was a result of sabbaticals. Given that the ratios in all other majors were above 60 percent, this should not be an issue during the accreditation visit.

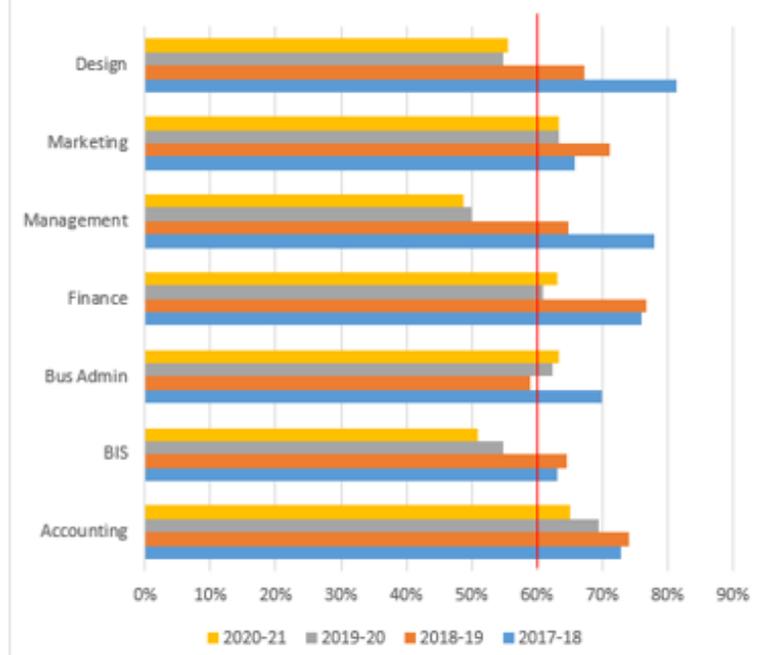


Figure 2. Percentage of FTE Delivered by Academically Qualified Faculty

- However, for FY20 and FY21, the College will be critically below the minimum professorial ratios in two business discipline (Business Information Systems and Management) and right at the minimums in all others. While the design majors are excluded from the AACSB accreditation, they will also be below desired minimums with no tenure/tenure-track faculty in apparel design and only one professorial faculty in interior design and design and innovation management. This is a threat to our continued accreditation by AACSB if we do not hire professorial faculty as outlined in [Appendix F](#). The academic quality of the design programs will begin to decline if we are not able to provide a sufficient number of professorial faculty with subject matter expertise.

- Non-Instructional Faculty and Staff

- To support our recruiting efforts to attract and retain under-represented students into our graduate and undergraduate programs, and to grow our continuing and professional education offerings, we have restructured and grown our marketing and communications unit.

- Engagement Program Managers

- In FY20 we hired two additional program managers to support instruction in blueprint and recruiting. The Corvallis-based program manager will teach professional development on-campus and will be the primary liaison providing transfer student recruiting and advising with area Community Colleges –Chemeketa, Lane, and Linn-Benton. The Portland-based program manager will teach professional development at the Portland center and will be the primary liaison providing transfer student recruiting and advising with Portland area Community Colleges – Clackamas, Mt. Hood and Portland.



## Appendix A: Portrait of the College

- Who We Are
  - The College of Business (COB) is the third largest of 11 colleges at OSU in terms of student enrollment and includes design programs not usually found in a college of business.
  - The COB's four-fold mission includes:
    - Educational mission: *We provide transformative educational experiences that produce highly competent, ethical and engaged future leaders who strive to make a difference.*
    - Research mission: *We conduct leading edge research focused on relevant and important business and societal challenges.*
    - Engagement mission: *We engage in our communities and work collaboratively to contribute to economic development, social progress and prosperity.*
    - Diversity, Equity and Inclusion mission: *We create a culture of belonging and community that values and respects differences so everyone feels welcome.*
  - The COB's mission is pursued through four overarching strategic initiatives: (1) student success, (2) faculty excellence, (3) external engagement and (4) inclusive excellence.
  - Behavior by members of the COB community is guided by commitments shared with OSU that are summarized as, Integrity, Respect and Responsibility, outlined in the COB's Code of Honor.
  - The COB offers undergraduate degrees in Accounting, Apparel Design, Business Administration, Business Analytics, Business Information Systems, Design and Innovation Management, Finance, Interior Design, Management, Marketing, and Merchandising Management at the Corvallis Campus. The Business Administration major and the Hospitality Management major are offered at OSU-Cascades. Coursework is delivered in Corvallis, online, in hybrid form at OSU's Portland Center, and at the OSU-Cascades campus in Bend, Oregon. Unduplicated headcount across all programs is 3,647 undergraduate students as of fall 2019, with 3,172 in Corvallis, 317 via Extended Campus, 144 at the Cascades campus in Bend, and 14 enrolled in the hybrid program offered at the Portland Center.
  - The COB offers a Master of Business Administration (MBA) degree with options in Business Analytics, Corporate Finance, Human Resource Management, Marketing, Organizational Leadership, and Supply Chain & Logistics Management; a Masters of Science in Business with options in Marketing Insights and Analytics and Supply Chain Analytics; a PharmD/MBA Double Degree; and graduate certificates in Business Analytics, Business Fundamentals, and Supply Chain and Logistics Management. Unduplicated headcount across these programs was 252 students as of fall 2019 including 140 in Corvallis, 67 in the hybrid program offered at the Portland Center and 45 online (note – this is only the second year that the MBA has been available in the fully online mode).
  - In 2014, the COB began offering a PhD in Business Administration degree with concentrations in Accounting (admissions currently suspended) and in Strategy, Entrepreneurship and Innovation. The first graduates of the program were spring and summer 2019. Fall 19 enrollment was 5 students.
  - The COB is home to 25 active student organizations.
  - In 2019 the COB part-time MBA program moved up 44 positions to #57 in the U.S. News and World Report rankings. Other rankings by CollegeChoice and OnlineMBAToday recognize the COB masters' level programs in Business Analytics, Logistics, and Supply Chain. In many cases, these rankings identify the COB as the most highly rated program in Oregon.



- Innovation
  - Supported by a \$775,000 grant from the Strada Education Network, the COB has rolled out components of Blueprint, a four-year comprehensive student engagement and support program.
  - In FY19 a growing Continuing and Professional Education program generated ~ \$850,000 in revenue.
  - Expanded online offerings generated 260% growth in revenue over the last five years.
  - A new STEM designated Master of Science in Business degree launched fall 2019.
  - A new STEM designated Undergraduate degree in Business Analytics launched winter 2020.
  - A Living Learning Community for all first-year students was launched in 2016.
- Impact
  - COB faculty produced 245 peer- or editorially-reviewed journal publications during the past five years.
  - COB faculty have numerous publications in high impact journals in the field, including The Accounting Review, Journal of the American Taxation Association, INFORMS Journal on Computing, Journal of Operations Management, Organization Science, Journal of Applied Psychology, Journal of Management, Journal of Consumer Psychology, Journal of Management Information Systems, Strategic Management Journal, Production and Operations Management, Manufacturing and Service Operations Management, Academy of Management Review, Academy of Management Journal, Review of Accounting Studies, Research Policy, Management Science, Journal of Financial Economics, and Journal of Business Venturing.
  - More than half of current tenure/tenure track faculty (34) have served in editorial positions for scholarly journals during the last five years. Including several tier-one premier outlets.
  - The COB awarded over \$600,000 in scholarships to over 300 students in FY19.
  - Six students from the first cohort of the COB PhD graduated with strong placement results, four papers published, and seven articles under review.
- Engagement
  - The COB now has 11 professional volunteer advisory boards for each program. With the Dean's Circle of Excellence, an advisory board for the COB overall, these boards provide oversight, input and ideas to COB programs and operations. All boards have a financial contribution which provide unrestricted support for each program.
  - 195 students participated in the Arthur Stonehill International Exchange, one of the largest of its kind in Oregon.
  - Quarterly, we host over 40 companies for College based career fairs, with over 400 students attending.
  - The student-run Oregon State Investment Group (OSIG) manages an investment portfolio of \$2.5 million for the OSU Foundation.
  - The Center for Marketing and Consumer Insights consulted on 21 projects, involving more than 20 students in FY19.

**Appendix B: Financial Information (provided by the Budget Office)**

- Summaries of activity in major funds managed by the unit are provided, including some detail on revenue and expense categories in E&G operations for FY17 through FY21 (projected).

<b>Budget Overview</b>						<b>College of Business</b>	
<b>Education and General Funds</b>	<b>FY16</b>	<b>FY17</b>	<b>FY18</b>	<b>FY19</b>	<b>FY20 Budget</b>	<b>FY21 Estimate<sup>1</sup></b>	
Actual Revenue	613,796	322,605	557,552	324,200	450,000	450,000	
Revenue Budget	865,000	502,500	225,000	225,000	400,000	450,000	
<b>Expenditure Budget</b>							
Initial Budget Model Resources	19,693,889	20,340,741	20,462,422	21,766,303	22,542,582	25,165,800	
Other Budget Distributions <sup>2</sup>	1,277,350	1,031,259	2,662,538	2,302,070	2,500,000	2,500,000	
Total Exp Budget w/o Carryover	20,971,239	21,372,000	23,124,960	24,068,373	25,042,582	27,665,800	
<b>Actual Expenditures</b>							
Salaries & OPE	19,709,620	20,444,249	21,686,236	22,366,097	23,037,000	23,728,000	
Services & Supplies	1,766,691	2,013,795	1,394,870	2,029,394	2,070,000	2,111,000	
Capital Outlay	21,679	3,502	7,000	47,734	25,000	25,000	
Student Aid	-	-	25	2,104	-	-	
Internal Sales Reimbursement	(17,725)	(6,075)	-	-	-	-	
Net Transfers	8,277	-	-	(203)	-	-	
Total Expenditures	21,488,542	22,455,471	23,088,131	24,445,126	25,132,000	25,864,000	
Previous Year Carryover	3,727,699	2,959,192	1,695,826	2,065,207	1,787,654	1,748,236	
<b>Fund Balance</b>	<b>\$ 2,959,192</b>	<b>\$ 1,695,826</b>	<b>\$ 2,065,207</b>	<b>\$ 1,787,654</b>	<b>\$ 1,748,236</b>	<b>\$ 3,550,036</b>	

Other Fund Information:	FY16	FY17	FY18	FY19	FY20 Budget	FY21 Estimate <sup>1</sup>
<b>Foundation Reimbursed Expenses</b>						
Scholarships	531,698	386,239	534,010	635,395	500,000	500,000
Other	1,169,866	1,337,735	3,170,891	3,037,588	3,000,000	3,000,000
<b>Total Expenses</b>	<b>\$ 1,701,564</b>	<b>\$ 1,723,974</b>	<b>\$ 3,704,901</b>	<b>\$ 3,672,983</b>	<b>\$ 3,500,000</b>	<b>\$ 3,500,000</b>
<b>Grants and Contracts</b>						
<b>Total Expenditures</b>	236,369	153,404	90,127	148,646	150,000	150,000
New Awards	285,042	191,050	(85,778)	741,250	500,000	650,000
<b>Gift Funds (M2xxxx)</b>						
<b>Total Revenues</b>	460	585	1,332	1,227	1,300	1,300
<b>Total Expenses</b>	319	(7,421)	1,182	(5,105)	1,300	1,300
Fund Balance	31,397	39,403	39,553	45,885	45,885	45,885
<b>Endowed Funds (438xxx)</b>						
<b>Total Revenues</b>	130,667	172,110	172,610	121,621	150,000	150,000
<b>Total Expenses</b>	130,667	172,110	172,610	121,620	150,000	150,000
Fund Balance	68	68	68	69	69	69
<b>Invention Royalties (06xxx)</b>						
<b>Expenditures</b>	-	-	-	-	-	-
Fund Balance	-	-	-	-	-	-
<b>Self Support</b>						
	96,094	83,561	109,367	629,087	641,669	654,502
<b>Total Expenses</b>	100,356	89,525	110,016	463,995	477,915	492,252
Fund Balance	15,647	9,683	9,034	174,126	337,880	500,130
<b>Statewides</b>						
<b>Total Expenses</b>	-	-	-	-	-	-
<sup>1</sup> Projections provided by Budget Office						
<sup>2</sup> Other budget distributions are budget office estimates based on trending and do not indicate an allocation of funds.						
* The growth in Business is related to a large increase in Ecampus and a small increase in Degree Foundations.						

**Appendix C: Strategic Plan Metrics (provided by the Budget Office from CORE reports)**

**College Success Metrics 10 Yr Trend - By Unit**

Select Unit  
College of Business

		2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	Trend
Faculty FTE	E&G Tenured/Tenure Tra..	28	26	32	41	47	54	56	50	52		
	Faculty FTE Total	78	81	90	113	124	128	131	138	143	147	
	Non-Professional Professional	30 48	33 48	36 54	43 70	44 80	41 87	40 92	51 87	53 90	57 90	
Faculty Headcount	Faculty Headcount TOTAL	88	90	98	121	134	139	142	148	150	167	
	Non-Professional	32	35	38	45	45	41	41	52	53	61	
	Professional	56	55	60	76	89	98	101	96	97	106	
	Tenured/Tenure Track He..	28	26	32	42	47	54	56	52	52	51	
E&G Tenured/ Tenure Track	0% E&G Funded	0	0	0	1	0	0	0	1	0		
	1%-33% E&G Funded	0	0	0	0	0	0	0	0	0		
	34%-66% E&G Funded	0	0	0	0	0	0	0	0	0		
	67%-99% E&G Funded	0	0	2	0	0	0	1	1	1		
	100% E&G Funded	28	26	30	41	47	54	55	50	51		
SCH	First Professional	0	0	0	0	0	0	0	0	0		
	Graduate	2,866	2,762	3,685	5,942	6,768	6,371	5,874	5,228	3,820	3,687	
	Lower Division	17,473	18,544	20,518	24,397	27,168	25,862	27,285	26,848	31,587	34,797	
	Other	0	0	0	0	0	0	0	0	0	0	
SCH_Total	Upper Division	36,419	38,400	38,974	51,279	49,337	47,846	45,597	48,439	49,675	50,439	
	FWS SCH Total	56,758	59,706	63,177	81,618	83,273	80,079	78,756	80,515	85,082	88,923	
	Undergraduate	53,892	56,944	59,492	75,676	76,505	73,708	72,882	75,287	81,262	85,236	
Goal1	1.3 First Year Retention R..	66.9%	63.3%	70.9%	70.6%	70.6%	73.1%	80.9%	73.3%	76.0%	76.4%	
	1.3 First Year Retention R..	80.4%	82.3%	83.0%	80.9%	83.2%	83.5%	90.0%	86.4%	84.6%	84.6%	
	1.4 6-Year Graduation Ra..	44.9%	42.1%	40.3%	37.1%	36.3%	44.0%	39.6%	41.5%	42.2%	49.7%	
	1.4 6-Year Graduation Ra..	64.4%	60.5%	58.5%	57.0%	55.9%	61.9%	64.4%	62.4%	67.5%	70.9%	
	1.5 Junior Transfer 4-Year..	63.1%	69.7%	56.8%	62.3%	65.9%	57.1%	70.0%	59.3%	56.5%	69.1%	
	1.5 Junior Transfer 4-Year..	77.4%	75.0%	67.0%	65.6%	70.6%	66.7%	75.6%	65.9%	65.7%	74.5%	
	1.7 % International Stude..	5.0%	13.0%	17.0%	19.0%	22.0%	23.1%	21.6%	21.4%	17.4%	18.1%	
	1.8 % High Achieving Ore..	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	25.1%	30.5%	
	1.8 % High Achieving Ore..	15.6%	22.0%	21.3%	26.4%	25.2%	31.2%	25.3%	32.2%	0.0%		
Resources	E & G - Ending Budget	8,589,589	10,666,201	13,433,027	19,613,724	21,655,058	22,950,455	24,698,938	24,331,192	23,088,132	24,445,126	
Research	Awards from Grants and Contracts (#)	2	9	17	11	17	7	8	6	3	2	
	Awards from Grants and Contracts (\$)	16,300	912,026	1,880,047	1,662,348	1,670,808	205,775	285,042	191,050	63,316	741,250	
Goal3	3.4 Dollars Leveraged per Appropriated Dollar for S..	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Degrees	Bachelors	519	536	717	704	834	780	752	719	949	1,065	
	Doctoral	0	0	1	4	4	4	1	6	1	5	
	First Professional	0	0	0	0	0	0	0	0	0		
	Masters	54	50	54	75	85	88	100	112	90	63	
Private Giving	Private Giving	2,496,298	4,521,118	5,670,556	7,138,767	10,814,020	5,073,389	4,458,252	2,818,199	3,361,077		

**Appendix D: Enrollment Planning Targets (FY17 through FY23) provided by the College**

**Graduate**

- PhD Program

- The PhD in Business Administration has two options: Accounting and Strategy, Entrepreneurship and Innovation. Admissions to the Accounting PhD option have been internally suspended until strategic hiring of accounting faculty are completed. Admissions to the strategy, entrepreneurship and innovation option occur every two years, with admission of 3-4 students per cycle. PhD students are currently funded for five years. The College does not plan to grow the PhD program over the next three years.

Graduate Enrollments	Fall 2015	Fall 2016	Fall 2017	Fall 2018	Fall 2019	Fall 2020*	Fall 2021*	Fall 2022*	Trend
PhD		6	10	10	5	9	4	10	
Corvallis MBA	228	170	163	161	174	165	145	125	
Corvallis MSB					31	40	40	40	
PDX MBA	33	46	50	77	67	60	50	40	
PDX MSB					1	10	15	20	
Online MBA				24	45	65	85	105	
Online MSB					2	20	40	60	
<b>Total</b>	<b>261</b>	<b>222</b>	<b>223</b>	<b>272</b>	<b>325</b>	<b>369</b>	<b>379</b>	<b>400</b>	

Graduate Degrees	FY16	FY17	FY18	FY19	FY20	FY21*	FY22*	FY23*	Trend
PhD				5	1	4		4	
Corvallis MBA	96	106	80	49	48	29	25	25	
Corvallis MSB					20	25	35	35	
PDX MBA	4	19	15	20	25	33	30	25	
PDX MSB							10	15	
Online MBA					6	15	30	45	
Online MSB						2	10	20	
<b>Total</b>	<b>100</b>	<b>125</b>	<b>95</b>	<b>74</b>	<b>100</b>	<b>108</b>	<b>140</b>	<b>169</b>	

\* - estimates and projections

Figure D-1. Graduate Enrollments and Degrees Conferred

- Masters Programs

- The Masters of Business Administration (MBA) and Masters of Science in Business (MSB) programs are offered at three locations (Corvallis, Portland and Bend) and in three modalities (face-to-face, 80/20 hybrid, and fully online).
- The Corvallis MBA uses face-to-face modality and primarily serves OSU faculty and staff using staff-fee benefits and international students progressing from the INTO OSU Pathway program. Students progressing from the INTO OSU Pathway program typically take two years to complete the MBA. The vast majority of domestic students are part-time, taking between three to five years to complete. As the part-time students graduate, we expect enrollment in the Corvallis MBA to slowly decline and stabilize at 80-90 students. This is consistent with the nation-wide trend of declining enrollments in full-time on-site MBA programs.
- The Corvallis MSB uses face-to-face modality and primarily serves international students progressing from the INTO OSU Pathway program who cannot meet the higher entrance requirements for the MBA program. This program can be completed in one year – three terms – provided students progress and start in fall. We expect enrollment in this program to stabilize with approximately 40 students per year from the pathway program.



- Portland MBA and MSB. The Portland programs are offered in the 80/20 hybrid format, with 80 percent online and 20 percent face-to-face. We include those students completing the hybrid program in Bend in the Portland counts since there are only 2-5 Bend students. The MBA options in Business Analytics and Supply Chain use the same courses as the MSB in Supply Chain Analytics, which creates great efficiency in our Portland offerings. What we have noticed is that students who work outside of the downtown Portland area are transitioning to the fully online programs, resulting in slightly reduced enrollments in the Portland hybrid offerings.
- Online MBA and MSB. We expect steady growth in our online programs, comprised almost entirely of part-time students who are working full-time while pursuing graduate education. We have expanded resources dedicated to graduate recruiting, and collaborating in Extend Campus, to grow enrollments in these two programs.

## Undergraduate

- Corvallis Campus
  - There were two significant initiatives that impacted undergraduate enrollments within the College.
    - In FY17, the College implemented our first-year experience intended to provide personal, professional and leadership skill development and to increase retention of all first-year students. This was the first year of our four-year Blueprint model.
    - In FY18, the College eliminated the professional school model. Under the professional school model, students were admitted into the pre-business major and had to apply to enroll in the professional school and graduate with a business degree. Historically, only 85 percent of the pre-business students were admitted to pro-school. Thus, from FY18 to FY19, there is a significant jump in enrollment resulting from admitting all lower division students directly into majors and increased student retention from the blueprint model.
  - Enrollments at the Corvallis campus are categorized based on the source of the student (see Figure D-2):
    - COB-FTFY: First-time first-year (formerly known as “freshmen”) students that are directly admitted and matriculate to the College. The College experienced a slight reduction in this population of students from fall 18 to fall 19. Moving forward, we expect the decline in this population to continue and reduced enrollment projections by two percent per year.
    - NonCOB-FTFY. First-time first-year students that are originally admitted to another college and then transfer to the College of Business (internal transfer). A large proportion of these students begin in the University Exploratory Studies Program (UESP). We expect two factors to influence decline in this population – the anticipated decline in high-school students coming directly to a four-year institution and elimination of the professional school model in the College of Engineering (another primary source of internal transfer students).

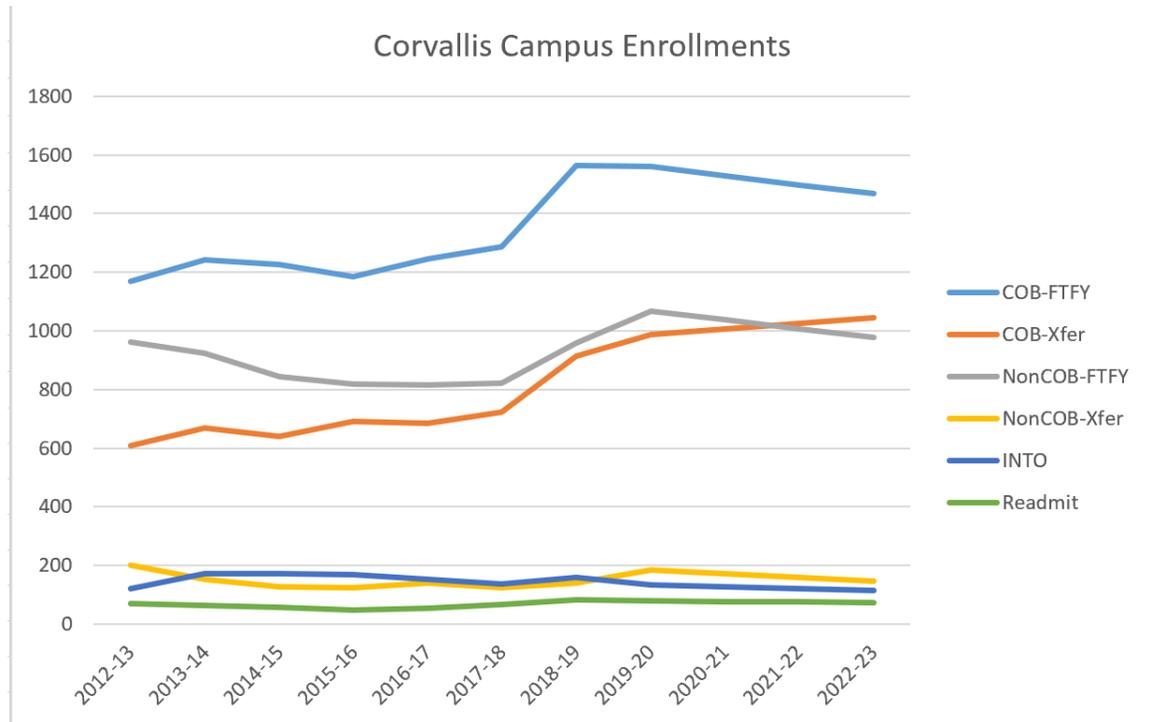


Figure D-2. Undergraduate Enrollment on Corvallis Campus by Student Source

- COB-Xfer. Students that transfer from an external institution directly into the College, predominately from Oregon Community Colleges. We expect this population to increase since the College is investing in recruiting and providing transfer advising services to select community colleges (emphasis on Portland metro area and Willamette valley).
  - NonCOB-Xfer. Students that transfer from an external institution to OSU, and then internally transfer to the College of Business. These students were predominantly from the College of Engineering – we expect that population to decline with the elimination of the engineering professional school.
  - INTO. These are international students that go through the one-year undergraduate Pathway program within INTO OSU. We have experienced a slight decline in this population and anticipate continued decline in the future.
  - Readmits. The College has a small number of students who return to OSU after a minimum of one-year absence to complete their degree. We expect this population to continue at the current low levels.
- The net result is an approximate 4.6 percent decline in undergraduate enrollments in Corvallis from FY20 to FY23 (see Figure D-3).

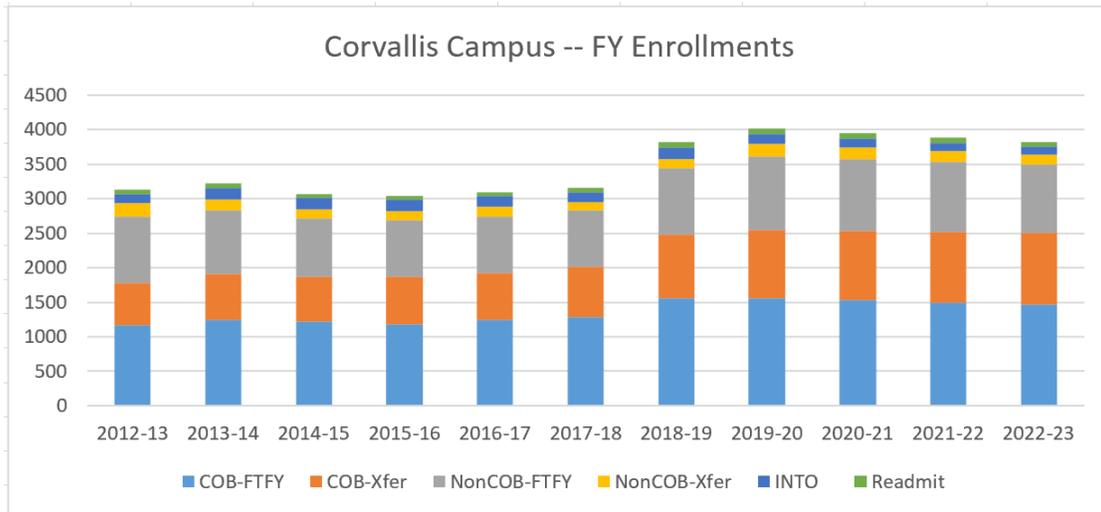


Figure D-3. Total Undergraduate Enrollments on Corvallis Campus

- Extended Campus

- The College is investing in recruiting, transfer advising, and marketing/communications to promote our degree completion programs for place-bound community college students. We have experienced steady growth in the population of transfer students into our online degree programs and expect this to continue into the future (see Figure D-4).

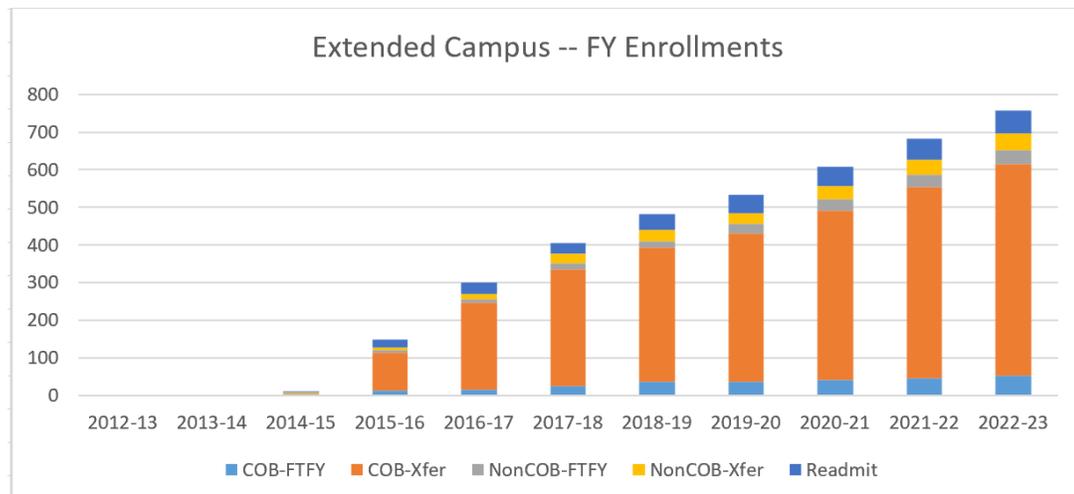


Figure D-4. Undergraduate Enrollment in Extended Campus by Student Source



- Degrees Conferred
  - Undergraduate degrees conferred lag enrollments. We expect gradual decline in Corvallis with approximately 70 percent of the student population comprised of first-time first-year students who require 4-6 years to complete their degree requirements. The online students are predominately transfer students who take 2-3 years to complete degree requirements. We have a small number of students participating in the hybrid program offered at the OSU Portland center (see Figure D-5).

Undergraduate	FY16	FY17	FY18	FY19	FY20	FY21	FY22	FY23	Trend
Corvallis	684	665	858	918	918	872	828	787	
eCampus	6	27	74	122	119	127	136	146	
Portland					1	5	8	11	
Total	690	692	932	1040	1038	1005	973	944	

Figure D-5. Undergraduate Degrees Conferred by Location

**Appendix E: Three-year financial projections (FY21, FY22, FY23) provided by the College**

**COB Operating Statement(E&G)**

	FY20	FY21	FY22	FY23
Revenue-	Estimate	Estimate	Estimate	Estimate
<b>General Resources Budget (formerly base budget):</b>				
<i>Productivity Allocations</i>				
Degree Foundations and Honors	5,744,753	6,264,776	6,330,461	6,451,500
Undergrad Completions	6,054,584	6,171,628	6,227,173	6,345,489
Alt Delivery (Ecampus/Summer)	6,076,415	7,546,000	7,869,739	7,749,633
<b>Settle Up/Down</b>	<b>513,804</b>			
Research	2,929	2,908	3,039	3,105
Strategic Populations and Cascades	1,235,941	1,259,165	1,304,000	1,332,293
Graduate Completions	1,194,896	998,537	1,285,793	1,332,785
<i>Other Allocations</i>				
OSU Strategic Funding				
Community Support Fund				
Adjust to Floor				
Provost Bridge Funding				
VPFA, Provost Adjustments	(600,000)			
Midyear Budget Reduction				
Distributed for Reserve	(209,543)	(226,183)	(234,273)	(237,190)
<b>Total</b>	<b>20,013,779</b>	<b>22,016,831</b>	<b>22,785,932</b>	<b>22,977,614</b>
<b>Dedicated Resources</b>				
State-targeted programs	-			
Differential and Profession Tution	2,531,365	2,406,443	2,526,765	2,653,103
Student Fees, Sales, Service	400,000	<b>405,549</b>	<b>409,604</b>	<b>413,700</b>
Endowment Match	152,097	152,097	152,097	152,097
F&A Recovery (ROH)			11,996	11,996
<b>Settle Up/Down</b>	<b>2,168</b>			
Tax on Income/Endowment Match 7.4%	(40,855)	(41,266)	(41,566)	(41,869)
<b>Total Fees, Sales, Services</b>	<b>3,083,462</b>	<b>2,964,088</b>	<b>3,088,466</b>	<b>3,218,900</b>
<b>Budget Model Total</b>	<b>23,058,554</b>	<b>24,939,654</b>	<b>25,844,828</b>	<b>26,166,642</b>
<b>Transfer from other OSU departments</b>				
Honors	92,700	97,335	102,202	107,312
TRF	259,368	232,054	232,054	232,054
Ecampus-Advising	180,000	210,000	240,000	270,000
Fund Salary Incr	79,790			
Other Campus Support	150,000	150,000	150,000	150,000
<b>Total</b>	<b>761,858</b>	<b>689,389</b>	<b>724,256</b>	<b>759,366</b>
<b>Total Revenue</b>	<b>23,820,412</b>	<b>25,629,043</b>	<b>26,569,084</b>	<b>26,926,007</b>



## COB Operating Statement(E&G)

Expenses-	FY20	FY21	FY22	FY23
	FY20	FY21	FY22	FY23
<b>Undergraduate Programs</b>				
Advising	1,214,757	1,285,737	1,319,623	1,366,135
Undergraduate Recruitment	235,963	199,910	204,423	209,994
Career Success Center	125,157	130,195	133,912	137,722
Student Engagement	1,861,052	1,924,616	1,961,267	2,056,616
	3,436,929	3,540,459	3,619,224	3,770,468
<b>Graduate Programs</b>				
Graduate	345,352	354,578	364,947	375,660
Recruitment	427,757	410,866	399,945	381,386
	773,108	765,445	764,891	757,047
<b>Strategic Initiatives</b>				
Administration	289,705	295,540	305,754	316,332
MARCOMM	1,161,062	1,336,595	1,375,162	1,408,356
InnovationX	22,500	22,500	22,500	22,500
Advancement In Women Leadership	15,000	30,000	30,000	30,000
	1,488,266	1,684,635	1,733,416	1,777,188
<b>Advancement</b>				
	508,750	528,098	550,133	572,948
<b>Info. Technology/with TRF</b>				
IS-COB	507,207	557,325	569,593	582,314
TRF	243,323	243,087	245,657	248,279
	750,530	800,412	815,251	830,593
<b>Faculty Services</b>				
	620,442	690,272	708,214	726,761
<b>Dean Admin</b>				
	1,042,622	998,402	972,258	994,664
<b>Instructional</b>				
Research	845,176	950,893	956,585	977,557
School of AFIS	5,480,866	5,697,009	5,871,402	5,840,686
School of MES	4,772,349	4,622,528	5,069,103	5,137,323
School of MAD	4,597,941	5,252,922	5,427,566	5,500,706
	15,696,332	16,523,353	17,324,657	17,456,272
<b>Austin Family Business(Endowment Match)</b>				
	105,243	86,181	86,181	86,181
<b>Scholarships</b>				
	2,650	6,000		
<b>Total Expenses</b>	<b>24,424,872</b>	<b>25,623,256</b>	<b>26,574,225</b>	<b>26,972,122</b>
<b>Fund Balance</b>	<b>(604,461)</b>	<b>5,787</b>	<b>(5,141)</b>	<b>(46,115)</b>

**Appendix F: FY20 and FY21 Hiring Template**

Term/Year	General Position Description Information			Financial Information			Case and Contingencies		Approvals
Search initiated in FY20 or FY21	Department or School	Role or Specialty	Rank	Estimated Salary (not including OPE)	Funding source for position	Start-up Costs/Source	Rationale for hire	Contingencies/Assumptions/Concerns	Approved or Awaiting Approval
Fall FY20	College	Dean	Full Professor, Tenured	\$330,000 - \$370,000 (12 month)	College		Necessary leadership role.		Approved
Fall FY20	School of Marketing, Analytics and Design	Marketing faculty member	Assistant/Associate	\$140,000 (9 month)	College	2/9 summer support for 3 years (\$93,336 in total)	Replacement for Retired Marketing		Approved and Completed
Fall FY20	School of Marketing, Analytics and Design	Data Analytics faculty member	Assistant/Associate	\$135,000 - \$145,000 (9 month)	College	2/9 summer support for 3 years (\$90,000 to \$96,667 total)	Growth in demand for the major.	Search ongoing	Approved
Fall FY20	School of Accounting, Finance, and Information Systems	Finance faculty member	Assistant/Associate	\$155,000 - \$165,000 (9 month)	College	2/9 summer support for 3 years (\$103,333 to \$110,000 total)	Replacement for Finance Assistant Professor	Final Candidate declined offer the search will continue into Spring/FY20	Approved
Fall FY21	School of Accounting, Finance, and Information Systems	Accounting faculty member	Full Professor, Tenured	\$190,000 - \$195,000 (9 month)	College	2/9 summer support for 3 years (\$126,667 to \$129,999 total)	Replacement for Accounting Professor retired December 2019 (Graham)	Waiting on new Dean to make strategic decision regarding Accounting PhD program	Awaiting Approved
Fall FY21	School of Management, Entrepreneurship and Supply Chain	Management faculty member	Assistant/Associate	\$126,000 - \$153,000 (9 month)	College	2/9 summer support for 3 years (\$90,000 to \$96,667 total)	Replacement for Management Associate Professor leaving in June 2020 (Klotz)	Waiting on Associate Professor in Management to submit resignation letter and relinquish Tenure	Awaiting Approved
Fall FY21	School of Management, Entrepreneurship and Supply Chain	Entrepreneurship faculty member	Assistant/Associate	\$126,000 - \$153,000 (9 month)	College	2/9 summer support for 3 years (\$90,000 to \$96,667 total)	Replacement for Entrepreneurship Associate Professor leaving in June 2020	Waiting on Associate Professor in Entrepreneurship to submit resignation letter and relinquish Tenure	Awaiting Approved
Fall FY21	School of Management, Entrepreneurship and Supply Chain	Management faculty member	Assistant/Associate	\$126,000 - \$153,000 (9 month)	College	2/9 summer support for 3 years (\$90,000 to \$96,667 total)	Replacement for Management Assistant Professor leaving in June 2020 (Houston)	Waiting on Assistant Professor in Management to submit resignation letter	Awaiting Approved
Fall FY21	School of Management, Entrepreneurship and Supply Chain	Management Instructor	Senior Instructor	\$84,000	College		Replacement for Management Instructor (Martell)	Waiting on HR Decision	Awaiting Approved
Fall FY21	School of Marketing, Analytics and Design	Design faculty member	Assistant/Associate	\$90,000 - \$100,000 (9 month)	College	2/9 summer support for 3 years (\$60,000 to \$66,667 total)	Replacement for Associate Professor retired (Pederson)	Deferred to absorb budget cuts	Awaiting Approved
Fall FY21	School of Marketing, Analytics and Design	Design faculty member	Assistant/Associate	\$90,000 - \$100,000 (9 month)	College	2/9 summer support for 3 years (\$60,000 to \$66,667 total)	Replacement for Associate Professor retired (Mullet)	Deferred to absorb budget cuts	Awaiting Approved
Fall FY21	School of Marketing, Analytics and Design	Design faculty member	Assistant/Associate	\$90,000 - \$100,000 (9 month)	College	2/9 summer support for 3 years (\$60,000 to \$66,667 total)	Replacement for Associate Professor (Lee, S)	Deferred to absorb budget cuts	Awaiting Approved
Fall FY21	School of Marketing, Analytics and Design	Business Law Faculty Member	Assistant/Associate	\$90,000 - \$100,000 (9 month)	College	2/9 summer support for 3 years (\$60,000 to \$66,667 total)	Replacement for Professor retired (King, N.)	Deferred to absorb budget cuts	Awaiting Approved
Fall FY20	College	Asst Dir-Marketing Com	Open Rank	\$60,000 - \$65,000 (12 month)	College		Restructure marketing and communications to better		Approved
Winter FY20	College	Marketing Coordinator	Open Rank	\$50,000 - \$55,000 (12 month)	College		Restructure marketing and communications to better		Approved
Winter FY20	College	Graphic Designer	Open Rank	\$42,336 (12 month)	College		Restructure marketing and communications to better		Approved
Winter FY20	College	Program Manager	Open Rank	\$52,000 (12 month)	College		Growth in Student Success courses/program		Approved
Winter FY20	College	Program Manager	Open Rank	\$52,000 (12 month)	College		Growth in Student Success courses/program		Approved

## **Appendix G: Strengths, Opportunities, Challenges and Threats Analysis**

### **Strengths and Opportunities**

- *Student Success.*
  - Strength – Student Engagement via Blueprint. The COB is a campus leader in student engagement. We are in the rollout of our fourth year of Blueprint, an education-to-career program that is a 12-course series on personal, professional and leadership skill development and financial literacy. This commitment to student success is helping to narrow the opportunity gap as evidenced by our retention data: students who complete our first-year experience program are retained through the subsequent fall term at a 91% rate, overall, and at a 90% rate for underrepresented minorities. The model also incorporates a Peer Mentorship program in which all our incoming first year students are matched with an upperclass mentor. Our efforts have been externally recognized, attracting funding so that we can expand our efforts. This is aligned with the ‘selected tactic’ identified in OSU’s strategic plan: “increase our retention and graduation of all students” and a strategic initiative of the College to “increase access, retention, and graduation rates among all students regardless of race/ethnicity and socioeconomic status.”
  - Strength - Experiential Learning. Our industry partners recognize and support our efforts to prepare students to become profession-ready graduates through experiential learning. Our experiential learning programs are a significant and distinct resource in enhancing the overall educational experience of our students. The College operationalizes experiential learning broadly, including participating in major events or conferences, case/pitch competitions, applied projects, field trips, international experiences, workshops, internships, etc. The College has achieved the goal of 100% student participation in at least one experiential learning activity per year with the implementation of the initiatives like Fridays in Austin, Microenterprise Project in the first year program, Learning Labs, ethics case competition in the third year program and Travel Fridays. Other experiential learning opportunities for students include the following emerging centers of excellence and academies:
    - Launch Academy, an incubator for graduate and undergraduate student entrepreneurs who want to be immersed in an innovative, high-energy environment that promotes the creation, evolution and implementation of business ideas. Launch Academy students earn OSU credit for working on their businesses and have access to seed funding, prototyping equipment, co-working space, mentoring and training to help them advance their ideas. Launch Academy training helps students develop new products or services, market their ideas, build teams and secure funding, among other critical elements of entrepreneurial success. (see [Appendix J](#), Center of Excellence for Entrepreneurship and Innovation)
    - Center of Excellence for Business Analytics (see [Appendix L](#)), as a platform connecting business organizations, professionals, students, and faculty with a mission to educate and to exchange ideas on gaining competitive advantages from data. The Center provides corporate sponsored projects as a platform for graduate and undergraduate students to work on actual business issues, enhancing their applied education and employability in the job market.



- Center of Excellence for Marketing and Consumer Insights (see [Appendix M](#)) provides experiential learning and internship opportunities with local, regional and national clients. It provides skill development and training in marketing and consumer insights research methodologies to both graduate and undergraduate students. Recent experiential learning projects include:
  - Travel Portland. A team of 30 OSU students conducted intercept surveys over 12 months to help Travel Portland understand who was coming to Portland and why. The data generated were combined with real-time with data from leading national research agencies to support a comprehensive research portfolio to inform decisions to help enhance Portland as a destination for tourism and drive economic growth in Portland and Oregon. Travel Portland has recently renewed the contract for a second year, citing the quality and value of work that include reporting and analysis of the data gathered. Not only did the project allow the public to see the professionalism and conduct of OSU students when representing both the University and the client, but each of the students also gained unique and valuable work experience.
  - Portland Mercado is a market provided by the non-profit Hacienda CDC for Latino entrepreneurs to launch their businesses. To better serve this growing community, Hacienda CDC sought out CMCI to assess the market potential and financial viability for a “mobile food lab” to reduce development and production times for food-related products. The concept is to drive the mobile lab with a suite of food testing equipment directly to the business and test onsite both in Portland and around Oregon. CMCI developed financial models for mobile food lab operations and market assessment of the concept. Student researchers and faculty developed and administered both bilingual online surveys and bilingual interviews with target users. Additionally, the student researchers acted as a liaison between Hacienda CDC and the business owners. In addition, this project encouraged bilingual students, students studying a second language, and international students to participate and benefit from the opportunity to showcase their language proficiency. As a result, CMCI reached a broader group of OSU students to act as researchers and engage in a multicultural learning opportunity. Finally, the economic impact to the state of Oregon is significant (though Hacienda CDC has not shared the exact impact with us) through the promotion of entrepreneurship in this growing community and industry.
- Professional Sales Academy, dedicated to promoting leadership and professionalism in the field of sales and introducing sales fundamentals to students through the use of hands on workshops and sessions led by leading industry sponsors. Students are given the opportunity to interact and network with industry sales executives at Sales Academy events as well as participate in regional and nationwide sales competitions. We host the only Pacific Northwest regional sales competition at the OSU Portland Center. In its first two years, we receive ~\$100,000 in sponsorship support from industry.
- Center for Supply Chain Excellence (see [Appendix N](#)), a leading source of knowledge creation, experiential learning, and dissemination in supply chain and analytics. The center channels supply chain projects from industry. If a project matches the curriculum of a class, it will be incorporated into the class, providing students a real-world case analysis. If a project fits a faculty’s research agenda, then it may be led by the faculty who will recruit and mentor students to engage in the research.



- Strength – Integrated Professional Development and Career Success Center (CSC). The CSC provides career planning and career search services for UG and graduate students, as well as employee relations services. We have refined the CSC programming and staffing to complement the professional development curriculum within the Blueprint program, aligning emergent student needs and employer needs.
- Strength - Academic Performance Interventions. The first year experience courses within Blueprint incorporate grade report assignments that requires students to submit their grades from their Baccalaureate Core courses. The College does not have access to this data otherwise. We engage with other colleges when we learn of issues in courses outside the College (e.g., math, science, writing courses). The College established a learning assistance/tutoring service to support students in high failure rate courses and we collaborate with the Academic Success Center on a Supplemental Instruction program for high failure rate courses. The College has invested in Supplemental Instruction (SI) for two of its high failure rate College of Business courses (financial accounting and managerial accounting) to provide additional support and guidance for students in these courses.
- Strength – Financial Hold Interventions. The College established a process to identify and support students that have registration holds due to account hold balances. If the student has financial need and is in otherwise good standing, the College provides financial support to assist with the account hold balance. Recipients must complete a financial plan with the College’s financial planning expert.
- Strength - Coordinated Academic Advising and Student Engagement teams. Advising and Student Engagement teams are cross-trained to ensure seamless student support. The teams deliver workshops, group advising sessions and classroom presentations to provide students with efficient access to critical information on registration processes, time management, study abroad opportunities, scholarships, internships, program specifics, etc.
- Opportunity – Expand High Achieving Student Initiatives. The College established the Dean’s Academy in FY17 and continues to enhance programming for high achieving students. Eligibility and retention criteria are consistent with the university Honors College. Both include access to exclusive programming, access to honors sections and a transcript visible option. The College collaborated with the Honors College to recruit additional eligible honors students at START and to provide scholarships. The College also added honors sections of business courses. With expanded experiential learning opportunities, the College needs to collaborate with the Honors College to define how the honors thesis requirements can be met with experiential learning. The College initiated ‘auto’ scholarship offers to prospective, high-achieving students for FY21 in which the corresponding university offer was less than that made by University of Oregon.
- Opportunity - Covering the Gap for High Need COB students through Scholarships. 671 high-need, OR resident students have a ‘gap’ of \$21,488 in fall 2019. This includes tuition and room/board. Ideally, we would like to cover the cost of tuition for the highest of high need students. Because there isn’t a more granular description of need, we default to what the highest of high need students would need to cover tuition – these are the ones that have an Expected Financial Contribution (EFC) close to zero, and receive Pell + State support of \$9395. To cover tuition (\$11,715), these students would need approximately \$2,400. This is the goal amount per high need student. With 671 such students in FY20, that works out to \$1.6 million, which is well above what our current scholarship budget is (approximately \$846k for retention and recruiting of all students for FY21). Alternatively, with the average



gift for high need students being \$8,257, and tuition being \$11,715, the gap would be approximately \$3500 per student, or \$2.35 million overall.

- Opportunity - Provide Financial Literacy Education. The Oregon State University Center for Advancing Financial Education (OSU CAFÉ) (see [Appendix O](#)), housed in the College of Business (COB), provides research-based curriculum for all OSU students; and, through workshops, training, counseling, a peer mentorship program and other resources, provides services and support to students at OSU and to communities across the state. The mentorship program offers students the opportunity to be trained in aspects of financial literacy that correspond closely to what they would be expected to do if they entered the financial advising field.
- Faculty Excellence.
  - Strength - Strong International Reputations of our Prominent Faculty. The table below compares the research productivity of our academic faculty for the five-year periods covered by our most recent AACSB accreditation reviews. There has been a noticeable increase in the number of Tier 1 and Tier 2 articles, reflective on our focus on outlets appropriate for PhD granting business schools.

	2013	2018	2009-13	2014-18	Increase *
Impactful Articles	27	46	93	191	105%
Tier 1 or 2 Articles	9	30	34	96	182%
% Impactful	64%	88%	65%	73%	13%
% Tier 1 or Tier 2	21%	58%	24%	37%	56%
Articles Per Scholar	0.79	0.83	2.29	3.35	46%
Scholars per year +	53	63	42.4	62.8	48%

Professorial faculty of all ranks including those with administrative assignments

\* Increase compares 2009-13 to 2014-18

+ Scholars per year is a weighted average of the number of scholars in the years in a range

- COB faculty serve as editor or associate editor for 15 different academic journals.
- COB faculty serve on the editorial review board for 44 academic journals.
- Metric-Based Performance Evaluation Systems that Advance Faculty Excellence.
  - See [Appendix P](#) for a detail description of the performance evaluation system.
  - Annual review process. Based on the AACSB feedback and input from the research committee, the College revised the annual Periodic Review of Faculty (PROF) evaluation process to align with the merit-based performance evaluation system. The performance evaluation uses numerical criteria and is calibrated across disciplines. The annual review process has the following benefits: it supports transparent performance evaluations; it clarifies research excellence expectations; it informs workload assignments and compensation decisions; and it identifies mentoring and hiring needs.
  - Faculty tracks tied to research productivity. The College recognizes different career tracks for post-tenure Tenure/Tenure-Track faculty. This allows for better alignment of workloads to research productivity and more equitable performance evaluations in relation to tracks.



- Research award/grant opportunities. The College will continue to invest significantly in research awards and grants to support new faculty research initiatives and to provide recognition for excellent research outcomes. Monetary awards are given for premier publications and sustained excellence in research.
- Research reputation tracking. Research rankings and norms by discipline are tracked to ensure fairness in evaluations, to advance the research culture and to determine areas of need in terms of faculty hiring.
- Impact tracking. The College tracks editorships and editorial board memberships as well as media hits.
- Opportunity - College Restructure to Schools. The College is continuing the transition to a new three school structure. We have already achieved much improved communications and faculty/staff support processes as a result of the organizational structure change. We anticipate positive synergies in terms of research and new programs to emerge from the faculty groupings. We are waiting for faculty senate approval of the restructure to complete our revision of College policies and processes (specifically related to promotion and tenure).
- Strength - Faculty and Staff Development Committees. In FY19, the College launched and supports parallel Faculty and Staff Development Committees. These committees focus on community building among the faculty and staff and provide critical feedback on College communications and research support policies, conducts and shares faculty climate surveys, and proposes and leads various professional development seminars and workshops to support faculty development. Examples of workshops include pre-tenure success workshops, post-tenure career planning workshops, advancement workshops, media training workshops, leadership development, etc.
- Strength - Teaching Excellence. In FY19, the college created the Assistant Dean of Teaching & Learning (ADTL) position to support faculty teaching success. The ADTL ensures learning assessments are coordinated across all locations and modalities. The ADTL also evaluates the teaching evaluation processes, provides teaching-related professional development opportunities, and oversees awards for teaching excellence.
- Opportunity - Advancing a Culture of Research Excellence. The College continues to invest in a series of concerted efforts to advance the caliber of our research portfolio through strategic hires, market-competitive compensation policies, research awards and refined performance evaluation processes. The Faculty Development Committee and the Research Committee both contribute regularly to the refinement of our research support initiatives.
- External Engagement.
  - Strength - Volunteer, Industry, Donor and Alumni Engagement. The College manages a streamlined process to engage external partners in a number of ways. In FY19, over 570 external constituents participated in these engagement activities.
    - Guest Speakers. Alumni and friends can engage in major coursework and Blueprint related activities in Austin Hall and in the Portland Center starting FY19. These opportunities are leveraged by our foundation and alumni association partners regularly so we maximize reach in connecting to our external stakeholders. Faculty and clubs may utilize the external engagement team to identify speakers for their courses.



- Advisory Boards. The College has 11 advisory boards that currently have over 250 members. The advancement team supports with board member recruitment, meeting logistics, board communications (charters, agendas, web, directories, etc.).
- Thought Leadership Events. The College leads and supports several thought leadership series including: (1) Advancing Women in Leadership, a sponsored quarterly event series in Portland that convenes 400+ alumni and business professionals annually; (2) MBA Thought Leadership, a twice quarterly event series in Portland that convenes MBA alumni and current MBA students, and thought leaders around timely business topics; (3) Design Network with OSU Alumni Association, a quarterly series that convenes Portland area professionals in the design industry;.
- Donor/Alumni/Volunteer Award Events. The College hosts multiple annual celebrations to recognize alumni/donors/volunteers and their support of the College, including the “Impact at Work” luncheon and an annual celebration of the impact of scholarship and program support.
- Opportunity – Expand Continuing and Professional Education. The College continues to develop business related continuing and professional education (CPE) programs. A faculty committee, comprised of one representative from each school, provides oversight of our CPE programming. The content of new programs is reviewed by subject matter experts within the schools to ensure the quality of the program is consistent with market expectations of programs sponsored by a business school. The CPE program also uses a well-defined process to recruit, train, and evaluate instructors hired to deliver these non-credit programs.
- Opportunity – Restructure Austin Family Business Program. The AFBP is a resource for multi-generation family-owned business within the Pacific Northwest. However, we are not achieving the full potential from this program. See [Appendix K](#) for a description of the Center for Excellence in Family Enterprise.
- Opportunity – Expand K12 Outreach. The College has multiple current K12 outreach activities in financial literacy, entrepreneurship and makerspace related programs. Additional opportunities and funding opportunities are continually sought.
- Inclusive Excellence.
  - Strength - DEI Training for Faculty/Staff and our Employers. The College created a 15-min online DEI training program for all employers who participate in our College of Business career fairs. Employers are expected to complete the training before arriving on campus. In partnership with the Career Development Center, this training will be available in spring FY20 to employers participating in the central career fairs for the university. In FY21, all College of Business faculty and staff who serve on search committees will be expected to complete the training.
  - Strength - Center for the Advancement of Women in Leadership. The mission of the Center for the Advancement of Women in Leadership (see [Appendix I](#)) is to change the landscape of business leadership by moving more women into leadership roles, enabling women to have equitable influence on business decisions and growth. Center activities include: raising awareness in the OSU community and external community on the challenges women in business face; preparing our communities with tools to create meaningful and sustainable change for women in business; and providing professional development opportunities to advance them in business careers.



- Strength - DEI Advocate Program. Launched by the DEI committee within the College, DEI advocates are volunteers for service role in the College to foster inclusive excellence. DEI advocates commit to professional and personal development, professional action and change, and contribution to inclusive excellence in the College. The goal is to have a DEI advocate on every standing committee in the college to ensure an DEI lens is applied to and integrated within all of our work.
- Opportunities – Expand DEI Successes in Student Programs
  - The MBA program achieved gender parity in its newly admitted students for the second year in a row. The opportunity is to expand enrollments in other under-represented categories.
  - Launch Academy, the OSU incubator for student entrepreneurs, continues to create an inclusive community for students to explore innovation; 42% of students enrolled this term identify as women, while 45% identify as nonwhite. Students include undergraduate and graduate students and represent 8 different colleges across OSU. The incubator serves over 50 teams per academic year, with the opportunity to expand awareness of the incubator for even greater numbers of OSU students to explore the feasibility of bringing their ideas to market.
- Opportunity – Expand Undergraduate Recruiting Team: To improve market awareness and attract students from diverse socio-economic backgrounds, we established a recruiting team. Recruiting staff are located in Portland and Corvallis. The recruiting team actively engages with central to try to improve communications flow, messaging and provide advising on recruiting that would better feed the College programs. The recruiting team maintains regular presence at regional Community Colleges, providing current articulation tables, delivering coursework, and building relationships for referrals. Our opportunity is to continue to expand our engagement with community college faculty, staff and students with the goal of increasing the number of students who transfer to OSU for degree completion in Corvallis, Bend, Portland and online.
- Opportunity – Expand Domestic Recruiting for Online Graduate Programs. The College systematically engages with the regional and national pipeline of MBA/MS applicants through marketing, event attendance and 1:1 meetings in Portland, attendance at select recruiting fairs, outreach efforts with regional and national employers and targeted purchase of prospect names. The College has made significant investments in Salesforce-Pardot to professionalize and expand recruiting communications flow and tracking. The opportunity is to collaborate with Extended Campus to increase the number of students who enroll in our fully online graduate degree programs. This enables the College to provide distinctive graduate education to those who are unable to relocate to Corvallis.
- Opportunity – Expand International Recruiting to All Graduate Programs. Significant changes were made to the Pathway experience including curricular changes, a student ambassador program, classroom visits, coffee hours and expanded College participation in Pathway classes to improve the quality of the Pathway experience for applicants from INTO. The College will continue to work with INTO to adjust their recruiting practices and to offer in-demand programming to return international admissions to peer-school norms. The College is encouraging conversation and action between INTO and Extended Campus in order to provide true global recruiting/access to all of our graduate offerings.



- Opportunity -- Expand COB leadership and scholarship on DEI through continued faculty/staff professional development (e.g., expanding inclusive hiring training) and investment in research.

### Challenges or Threats Facing the College

- Overall
  - Challenge – OSU Cascades. The academic degrees offered by the College at the Cascades campus (Bend) offers both opportunities and challenges. The opportunities stem from potential enrollment growth in business programs offered in a destination location at a small scale campus that may be appealing to certain market segments at the undergraduate levels. The challenges stem from the current operating and governance structure for the Cascades campus. The tenure-home for the business faculty at Cascades is within the College, yet the College does not have operational control over the programs, faculty or related student services. The business faculty at Cascades are managed by campus administrators for course and service assignments. In addition, the advising and career services for business students at Cascades are managed separately by Cascades campus administrators. The College monitors the Cascades operation and advises on necessary changes to ensure that academically and professionally qualified faculty are in place and that program standards are consistent with College and AACSB standards. The College currently funds a program manager at Cascades to ensure the Blueprint model is fully implemented at Cascades.
  - Challenge - OSU Budget Model. The continual adjustments made by the office of Budgets and Fiscal Planning (BFP) to college budgets produces extreme uncertainty with respect to the actual annual budgets colleges will receive. In addition, even using the budget reports generated by CORE, the College is not able to replicate the budget forecasts provided by BFP. This further complicates fiscal planning since are not able to accurately forecast the impacts of alternative planned strategies.
  - Challenge – Lack of Integration across Technology and Data Systems. While we acknowledge that many advances are being made in these areas, it continues to be a challenge to get accurate data, especially related to the top of the recruiting funnel (inquiries about business programs).
- Student Success
  - Threat – Incoming International Exchange. In FY20, the College hosted 62 incoming exchange students from 17 countries. Our long-standing international exchange partners (Aarhus University in Denmark, for example) indicate that our fee structure is making it increasingly difficult to continue sending students to participate in our program. They indicate that the fees that we charge, which is in excess of \$1500 (~\$630 in student fees and ~\$940 in health insurance for one term) is significantly higher than those charged by any of their other US partners. As a result, some of our partners have chosen not to send students here in the upcoming cycle. Given the value that exchange students provide to our domestic students, it would be unfortunate if this trend continued. Most of our incoming students have comprehensive health insurance that OSU typically deems unacceptable based on internally established criteria. A reconsideration of these criteria, and accepting more insurance plans that these students have would alleviate concerns around fee structure.



- Faculty Excellence
  - Challenge - Accounting Faculty. The Accounting program, and the Accounting option within the PhD program in particular, face staffing challenges. Five tenured accounting faculty have retired or relocated in the past academic year, leaving us with no tenured faculty in Accounting. Our faculty hiring and development efforts have substantially elevated the level of academic accomplishment in the Accounting faculty over the past five years, with a strong set of Assistant Professors in place. The College plans to hire a tenured Accounting faculty in FY21. However, we face the challenge of significantly escalating salaries in accounting and a tight labor market.
  - Challenge - Lack of Funds for Faculty Fellowships, Professorships and Chairs. Most of our peers (and aspirants) already possess substantial endowed support for faculty research support which surpasses that of OSU. OSU currently possesses 4 Professorships, 1 Research Scholar, and 2 Faculty Fellowships. In contrast, our near neighbors have the following listed faculty endowments:
    - University of Oregon:
      - 2 Research Chairs
      - 9 Research Professorships
      - 6 Research Scholars
    - Portland State University
      - 2 Research Chairs
      - 8 Research Professorships
      - 1 Research Scholar
    - Washington State University
      - 8 Research Chairs
      - 3 Research Fellowships
      - 1 Research Professorship
  - Challenge - Lack of Faculty Expertise in Areas that Connect to Other OSU Strengths. The College hires academic faculty based on our discipline instructional needs and the ability of the faculty to contribute to discipline-based research clusters. These research clusters do not currently align with OSU strengths in non-business areas, such as sustainability, food and beverage, natural resources, marine science, etc. This presents challenges for the College to actively participate in some of the university initiatives that are science and engineering based, such as the Marine Science Initiative, Outdoor Products Initiative, etc.
  - Threat – Delayed Hiring of Professorial Faculty. High quality academic programs require oversight by professorial faculty who bring subject matter expertise based on their academic background. There are multiple programs within the College that do not have a sufficient number of professorial faculty. There are two related challenges from the OSU budget model that impact our ability to hire professorial faculty in a timely manner.
    - First, the OSU budget model employs a three-year lag model. That is, SCH and completion revenue are based on the moving average of the past three years. While this

helps those colleges with declining enrollments, it hurts those colleges with growth. To achieve growth, the College hires instructors to deliver coursework in the growth areas, with the intent to hire professorial faculty once increased revenue is realized from the growth.

- The compounding factor is unanticipated budget cuts and holdbacks. Once students are admitted into an academic program, there is an obligation to deliver the coursework in those programs in a manner that allows students to progress to degree completion in a timely manner. Thus, it is not an option to absorb budget cuts by laying off instructional faculty. The only viable way to absorb these cuts is to further delay hiring of professorial faculty in growth programs, and to delay replacing professorial faculty who leave the university.
- The recent \$600,000 holdback to the FY20 budget have exacerbated these challenges to a threat.
- External Engagement
  - Threat - OSU PACE. The Professional and Continuing Education (PACE) unit, which resides under the Division for Outreach and Engagement, continues to operate as a revenue-generating unit that offers programs that directly compete with programs offered by the College. They have recently rebranded PACE as “Workspace” and are now offering programs in “Customized Team Training”. The College has subject matter experts in this area, and has been offering undergraduate and graduate education for many years (e.g, BA 352 Managing Individual and Team Performance and BA 550 Organization Leadership and Management). The concern is that PACE/Workspace offers programs that do not have oversight by subject matter experts and is not in coordination or collaboration with units whose reputation is impacted by these actions. When these are business related topics, it harms the reputation of the College (the implication when a business topic is offered by OSU is that the College of Business provides oversight of the curriculum and program quality). Further, it damages OSU reputation when two OSU units compete externally for clients.
- Inclusive Excellence
  - Challenge – Lack of Integrated Recruiting and Enrollment Management. The lack of integrated recruiting and enrollment management at OSU poses financial challenges to the College and University budget. There is a need for better quality and coordinated communications with the units, better quality and coordinated recruiting with the units, streamlined application and transfer processes, better response times and financial aid packages and iterative experimentation. While improvements have been made in this area, it still remains a challenge. To address this weakness, the College invests time and resources in undergraduate recruiting.
  - Challenge - Unique Baccalaureate Core Requirements. OSU has unique general education (baccalaureate core) requirements that are not needed at other four-year institutions within the state and Pacific Northwest.
    - As part of the implementation plan for HB 2998, the Higher Education Coordinating Commission (HECC) has convened community colleges and universities to develop a common foundational curriculum available to all students. The resulting Major Transfer Maps (MTMs) have been created for many disciplines, including biology, business and writing. Students at community colleges who follow the prescribed business MTM and



complete all lower-division business degree requirements would still need to complete lower-division baccalaureate core requirements upon transfer to OSU.

- The Associate of Science Oregon Transfer (ASOT) degree program offered by Oregon Community Colleges was designed to meet the general education requirements at all Oregon four-year institutions. Note this is not a course-by-course articulation. Rather, completion of the ASOT degree provides completion of comparable general education requirements. For example, the ASOT degree program does not include an equivalent to the OSU course HHS 231 Lifetime Fitness for Health. So students who transfer to OSU with the ASOT degree are not required to complete HHS 231. This is one example of a unique OSU general education requirement that presents challenges in recruiting Community College students. If the transfer student does not earn the ASOT degree, then they are required to complete additional lower-division baccalaureate core courses upon transfer even if all other lower-division course requirements for their major are complete.
- Challenge - In-state and Proximate Competitors with Better Enrollment Management Processes and Financial Aid Packages. Enrollment Management is now providing Clearing House data so that units can track the outcome of admitted students who did not matriculate to OSU. An analysis of the data showed that 223 students that were admitted to OSU for fall 19 chose to attend UO instead. There was a difference in the auto-awards that UO and OSU made to these students, and the data shows a loss of Pell-eligible admits to UO.



**Appendix H: College Metrics**

The tables below summarize the metrics we track to assess our progress on the strategic initiatives outlined in this report: (1) **student success**, (2) **faculty excellence**, (3) **external engagement** and (4) **inclusive excellence**.

- Undergraduate Student Success Metrics

<b>Initiative</b>	<b>Metric</b>
Graduation/Completion Initiatives	<ul style="list-style-type: none"> <li>• Graduation rate</li> <li>• Yearly retention rate</li> </ul>
First Year Experience	<ul style="list-style-type: none"> <li>• First year spring to second year fall retention rate</li> <li>• Student Satisfaction and Belonging ratings (survey)</li> <li>• First year retention achievement gap</li> </ul>
Extending Blueprint Across the Curriculum	<ul style="list-style-type: none"> <li>• Students’ professional competency ratings (NACE survey)</li> <li>• Employer satisfaction scores (survey)</li> </ul>
Career Success Center	<ul style="list-style-type: none"> <li>• Placement rates (full-time, internships)</li> </ul>
Peer Mentoring	<ul style="list-style-type: none"> <li>• First year fall to first year spring retention rate</li> <li>• First year fall to second year fall retention rate</li> <li>• Number of flags and result</li> </ul>
UG Experiential Learning Initiatives	<ul style="list-style-type: none"> <li>• Experiential learning participation rate by year</li> </ul>
Academic Performance Interventions	<ul style="list-style-type: none"> <li>• DFW rates for COB students in high DFW-rate courses</li> <li>• Course GPA in supplemental instruction courses</li> <li>• Achievement gaps by focal population (URM)</li> </ul>
Financial Interventions	<ul style="list-style-type: none"> <li>• Return and completion rate for supported students</li> </ul>

- Graduate Student Success Metrics

<b>Initiative</b>	<b>Metric</b>
Revision of Domestic Recruiting process	<ul style="list-style-type: none"> <li>• Number of applicants at all stages of the funnel.</li> <li>• Number of admitted students.</li> <li>• Number and proportion of matriculated students.</li> </ul>
Graduate Recruiting Scholarships	<ul style="list-style-type: none"> <li>• Number of high-GMAT (640+) applicants and matriculates.</li> <li>• Number of alumni applicants and matriculates.</li> <li>• Number of applicants from strategic partners.</li> </ul>



International Recruiting	<ul style="list-style-type: none"> <li>• Number of Pathway progressors.</li> <li>• Number of direct-admit applicants.</li> </ul>
Program Offerings	<ul style="list-style-type: none"> <li>• Section enrollments</li> <li>• Diversity of students in online programs.</li> </ul>
Graduate Student Development and Support Services	<ul style="list-style-type: none"> <li>• Program satisfaction from exit survey.</li> <li>• Placement rates and career center participation rates</li> </ul>
Graduate Program Rankings	<ul style="list-style-type: none"> <li>• Ranking of programs - domestic and global.</li> <li>• Rankings relative to other Oregon schools.</li> <li>• Proportion of 10-year alum with current contact information.</li> <li>• Exit survey participation rate</li> </ul>

• *Faculty Excellence Metrics*

Initiative	Metric
Faculty and Staff Climate	<ul style="list-style-type: none"> <li>• Climate survey scores and changes over time</li> <li>• Number of faculty development committee proposals</li> <li>• Quality of completed projects</li> </ul>
Professional Development	<ul style="list-style-type: none"> <li>• Number of professional development programs offered for faculty and staff development</li> <li>• Number of programs attended by faculty and staff</li> </ul>
Teaching Excellence	<ul style="list-style-type: none"> <li>• Number of teaching excellence professional development programs offered</li> <li>• Number of faculty mentored annually</li> <li>• Percent of courses reviewed annually</li> <li>• Number of learning objective assessments completed annually</li> <li>• Mean eSET scores and variance</li> </ul>
Growing the Faculty	<ul style="list-style-type: none"> <li>• Number of Tenure/Tenure-track faculty hires</li> <li>• Number of instructor hires</li> <li>• Faculty retention rate</li> </ul>
Advancing Research Excellence	<ul style="list-style-type: none"> <li>• Number of publications in premier journals and total publications</li> <li>• Number of editorships in premier journals and total editorships</li> <li>• Number associate editorships in premier journals and total associate editorships</li> </ul>



	<ul style="list-style-type: none"> <li>• Faculty citations</li> <li>• Number of research seminars by discipline</li> <li>• Placements of PhD students</li> <li>• Ranking of disciplines in national and global rankings</li> <li>• Number of competitive research awards and honors earned</li> <li>• Number and dollars of competitive grant awards</li> </ul>
Program Innovation	<ul style="list-style-type: none"> <li>• Number and quality of program innovation proposals</li> </ul>
Public Promotion of Faculty Thought Leadership	<ul style="list-style-type: none"> <li>• Number of press releases of faculty research in popular press</li> <li>• Media impressions</li> </ul>

• External Engagement Metrics

Initiative	Metric
Volunteer, Donor and Alumni Engagement	<ul style="list-style-type: none"> <li>• Attendance at College-led events</li> <li>• Number of partnered events annually with OSU foundation and Alumni Association.</li> <li>• Number of partner or leveraged events with OSU colleges.</li> <li>• Number of volunteers</li> <li>• Number of new board members and volunteers.</li> <li>• Percentage of board members rated as MG prospects.</li> <li>• Number of mentors</li> </ul>
Development and Stewardship	<ul style="list-style-type: none"> <li>• Dollars raised by OSUF development officers</li> <li>• Dollars raised in annual giving</li> <li>• Total number of households giving</li> <li>• Dollars raised by the College</li> <li>• Number of substantive contacts by the College</li> <li>• Number of stewardship contacts by the College</li> </ul>
Marketing and Communications	<ul style="list-style-type: none"> <li>• Open and click rates on College external emails</li> <li>• Number of unsubscribes in our distribution lists</li> <li>• Number of alumni and employer stories</li> </ul>
Employer interest and engagement	<ul style="list-style-type: none"> <li>• Number of participants in College career fairs</li> <li>• Number of industry guest speakers</li> <li>• Satisfaction rating from companies – hires, experience</li> </ul>



Centers of Excellence	<ul style="list-style-type: none"> <li>• Number of students participating in center activities</li> <li>• Success of InnovationX student entrepreneurs (revenue generated, media attention, business established, etc.)</li> <li>• Volunteer engagement in centers</li> <li>• Philanthropic giving to centers</li> <li>• Grants won for centers</li> <li>• Industry projects completed by centers</li> <li>• Diversity of participants in center activities</li> <li>• Participants in professional development programs</li> <li>• Number of businesses served by the centers</li> <li>• Revenue earned through open enrollment and custom professional development programs</li> </ul>
Employment placement	<ul style="list-style-type: none"> <li>• Number (and percent) of students placed in internships</li> <li>• Number (and percent) of students placed upon graduation</li> </ul>
Corporate partnerships	<ul style="list-style-type: none"> <li>• Number of sponsorships (by category)</li> <li>• Number of corporate memberships</li> <li>• Number (and percent) of returning sponsors and members</li> </ul>

• Inclusive Excellence Metrics

Initiative	Metric
Search Advocates	<ul style="list-style-type: none"> <li>• Number of search advocates in the College</li> <li>• Number of searches supported outside the college</li> <li>• Percent of searches supported inside the college</li> </ul>
Diversity, Equity and Inclusion (DEI) Professional Development	<ul style="list-style-type: none"> <li>• Number of newsletter publications by DEI</li> <li>• Number of faculty presentations on DEI at faculty meetings</li> <li>• Number of DEI professional development programs conducted for faculty and staff, students and external audiences</li> <li>• Number of DEI programs attended by faculty, staff, students and the community</li> <li>• Increase in faculty and staff DEI-related competencies (measured by assessment tools)</li> <li>• Diversity composition of all College panels, boards and guest speakers</li> <li>• Percent completion of DEI training for panelists, boards and guest speakers</li> </ul>



Diversity of the Faculty and Staff	<ul style="list-style-type: none"> <li>• Annual evaluation of faculty and staff population</li> <li>• Implementation of targeted faculty and staff recruitment strategies for underrepresented groups and implementation of best practices in recruiting diverse talent for faculty and staff searches (search advocates; revision of DEI-related language in job descriptions; prioritization of demonstrated DEI competencies in description of minimum qualifications)</li> </ul>
Diversity of the Student Body and Student Leadership	<ul style="list-style-type: none"> <li>• Percent URM population by program</li> <li>• Retention, graduation and placement rates for URM population by program</li> <li>• Percent URM populations in student leadership positions</li> <li>• Implementation of targeted student recruitment strategies for URM students (engagement with high schools, culturally-specific organizations with high numbers of URM students for recruitment, programming)</li> </ul>
DEI Advocates	<ul style="list-style-type: none"> <li>• Number of DEI Advocates</li> <li>• Percent of standing College committees with a DEI advocate</li> </ul>
DEI Climate	<ul style="list-style-type: none"> <li>• Student Belonging Survey scores</li> <li>• Faculty and staff climate survey scores</li> <li>• Clear, visible communication by leadership of College’s commitment to DEI and transparent disclosure of current data and metrics (website, annual reports, strategic plan)</li> <li>• Clear expectations regarding DEI competencies included in T&amp;P criteria for faculty; staff merit raises tied to DEI efforts and participation</li> <li>• Analysis of communications/marketing materials to ensure representation of diverse perspectives and authorship</li> </ul>
Curricular Reform	<ul style="list-style-type: none"> <li>• Percent of students reached with DEI learning objectives</li> <li>• Percent of learning objectives met on DEI content</li> <li>• DEI in curricular topics/case studies/assignments/materials and faculty participation in trainings/workshops to integrate DEI into specific course curricula</li> <li>• Increase in student DEI-related competencies and demonstrated ability to apply DEI concepts to business topics</li> <li>• Addition of new courses related to DEI (possibly cross-listed interdisciplinary) or DPD courses</li> </ul>
UG Recruiting	<ul style="list-style-type: none"> <li>• Enrollment by student type – FY, transfer, high achieving, URM, location, modality, campus</li> </ul>



## **Appendix I: Center for the Advancement of Women in Leadership**

- **Vision and Mission**
  - The vision of the Center for the Advancement of Women in Leadership is to change the landscape of business leadership by moving women into leadership roles in industry, enabling women’s perspectives to have equitable influence on business decisions and growth. The mission of the Center is to empower students, alumni, business professionals, corporations, and people of all genders with education, tools and training to advance inclusion in the workplace.
- **Strategic Plan**
  - The College of Business strategic plan has educational, research, engagement and diversity/inclusion mission statements, aligning well with the activities of the Center for the Advancement of Women in Leadership. Educational, research and community engagement activities of the center are a part of the Center’s goals and objectives, and the central purpose of the Center is to advance diversity and inclusion in business.
- **Goals and Objective**
  - Goal 1: Increase awareness of issues related to gender equity, inclusion and advancement of women in business through education, research, programming and partnerships
    - Host the annual Susan J. McGregor Lecture on women in leadership and require all first-year College of Business students to attend; grow the McGregor Lecture to offer a version in Portland
    - Launch a newsletter (AWL Call) for the community that includes research and news about gender equity and inclusion in the workplace
    - Develop and deploy training for College of Business faculty/staff, employers and volunteers; grow the training to serve campus partners
    - Host a Meet the Firms event focused on recognizing companies that have excelled at diversity and inclusion initiatives
  - Goal 2: Provide opportunities for organizations to obtain and utilize tools that promote structural and organizational change in business to empower women’s voices, leadership and interests
    - Host open enrollment and custom corporate training programs to support business professionals with advancing structural and organizational change
    - Develop and host male allyship training for students
    - Develop and host workshops on recognizing and countering bias for students
  - Goal 3: Provide opportunities for women, allies and stakeholders to develop professional competencies and skills that advance the career and vocational goals of women
    - Host panel/small group discussion events for working professionals
    - Host a spring break trip for students to meet with working professionals in Portland
    - Host a program for students on professional attire



- Sponsor and provide guidance to the Women in Leadership student club as well as other OSU clubs that seek to host programs with a purpose that aligns with the Center for AWL's mission
- Goal 4: Build a community of emerging and accomplished leaders and change agents committed to promoting gender equity in business and higher education
  - Revamp and build the AWL In membership program
  - Host events for women business professionals that help them build their network (e.g., fireside chats, etc.)
  - Support the JD Power Fellows with building a community



## **Appendix J: Center of Excellence for Innovation and Entrepreneurship (InnovationX).**

- **Vision and Mission**
  - InnovationX, the Oregon State University Center of Excellence for Innovation and Entrepreneurship in the College of Business, is establishing OSU as a destination for entrepreneurially-minded students across the Pacific Northwest and beyond. The mission of InnovationX is to develop an inclusive community of student entrepreneurs who are prepared with the skills and resources to explore and advance new ideas.
- **Strategic Plan**
  - Alignment with the College of Business Strategic Plan. The College of Business strategic plan states that: “It is our goal that every OSU College of Business graduate is ready to make an immediate, meaningful impact for the organizations that employ them and for the communities they call home.”
  - InnovationX is a training ground that prepares students with the entrepreneurial skills – creativity, innovation, risk taking, resilience, leadership, teamwork, etc. – necessary to create meaningful impact within the organizations that employ them and/or in their communities, especially should the students’ businesses succeed. The College of Business strategic plan has educational, research, engagement and diversity/inclusion mission statements, aligning well with the activities of InnovationX. Educational, research and community engagement activities of the center are described in more detail below, and the InnovationX mission and dashboard captures the center’s commitment to advancing diversity and inclusion in the entrepreneurship community we are building.
  - Our efforts and success with building an inclusive entrepreneurship community are a differentiator for the College of Business – inclusive entrepreneurship communities are rare, including in higher education; university entrepreneurship programs tend to be comprised of predominantly White and male participants and are most typically business and engineering student-centric. Often, diversity and inclusion initiatives in a higher education setting take the form of identity-based programs or initiatives; rarely do entrepreneurship centers or programs in higher education take a comprehensive approach to building an inclusive community from the ground up. For example, universities may offer a women’s accelerator, rather than make a concerted effort to reach gender parity in their accelerators that are not focused on women. The success of InnovationX is measured on how our student entrepreneurs excel, as well as who those student entrepreneurs are, with emphasis on a community that is inclusive across genders, race/ethnicities, family income and major of study and can be a model for inclusion among entrepreneurship centers nationally, as well as within the College of Business itself.
- **Goals and Objectives**
  - Goal 1: Promote awareness of and familiarity with entrepreneurship among prospective and current OSU students
    - Grow readership and open/click rates for the LAUNCH newsletter
    - Host and educate high school students on entrepreneurship opportunities
    - Grow the Entrepreneurship Awareness Days program to increase the number of overall students impacted and further diversify the units participating and the students



- Goal 2: Cultivate interest and participation in entrepreneurship among OSU students
  - Launch the Idea Development Studio
  - Partner with academic and student affairs units across campus and execute programming (workshops, pitch competitions, etc.) relevant to their student populations
  - Increase the number of and diversify student attendees to the Launch-U event series
  - Grow enrollments and diversify students in the Launch Pad courses.
- Goal 3: Accelerate the success of OSU student entrepreneurs
  - Grow enrollments and diversify students in the BA 367/368/505: Launch Academy and Advanced Launch Academy courses
  - Support teams with becoming competitive in seed-funding competitions



## **Appendix K: Center of Excellence for Family Enterprise**

- Vision and Mission:
  - To be the prominent resource for family enterprises and the advisers that support their success.
- Strategic Plan
  - Research
    - The acceleration of a focused research agenda, expanded engagement of business discipline faculty in both scholarly and applied inquiry, and delivery of new knowledge to expand our current reach and provide the Northwest's family business community with greater access to resources.
    - Continued international leadership in convening prominent family business scholars through the Family Enterprise Research Conference that is notable for early career development of faculty in family business research.
    - Strategies and Actions to Advance the Center:
      - Support two professorships/fellowships for academic year 20-21
      - Engage in joint appointment conversations
      - Establish a summer research award and visit for rising stars
      - Identify an academic Director
      - Host the Family Enterprise Research Conference in Portland in 2021
  - Education
    - Expand the learning to students on campus and online offering a family business minor and a family business concentration within a business administration degree at both the undergraduate and graduate levels.
    - Build out continuing education for the various advisory and professional communities that support multi-generational family enterprises.
    - Become an international leader in certifying advisors as knowledgeable in understanding the complexities and unique aspects of working to support family-owned enterprises.
    - Strategies and Actions to Advance the Center:
      - Promote family business course offerings across Oregon State
      - Leverage current education for students and launch strong foundational education for professional advisers, non-family leadership and succession planning. Provide in person and online opportunities.
  - Outreach
    - A continued emphasis on succession planning, an Austin Family Business Program hallmark that fills a critical need with more than one-third of the Northwest region's closely held businesses expected to change hands over the next five years.



- Support the needs of family leaders in the Pacific Northwest by providing rich content that allows for engagement and networking with peers and opportunity to learn relevant material.
- Recognize exemplars of family enterprise ownership, succession and planning via our 30 year history of Excellence in Family Business Awards
- Strategies and Actions to Advance the Center:
  - Host frequent gatherings led by professional advisers on selected topics for engagement with family enterprises of all shapes and sizes.
  - Promote exemplars in family enterprise through OSU, College of Business and family enterprise communication channels.



## Appendix L: Center of Excellence for Business Analytics

- Vision and Mission
  - The Center of Business Analytics in the College of Business at Oregon State University serves as a platform connecting business organizations, professionals, students, and faculty with a mission to educate and to exchange ideas on gaining competitive advantages from data. Working with its corporate sponsors, the Center accomplishes its goals through corporate sponsored projects, executive training, symposia, and sponsored faculty research, focusing on applying analytics technology such as data/text mining, data visualization/exploration, predictive modeling, and optimization to identify opportunities and to provide solutions.
- Strategic Plan
  - The center will integrate faculty expertise in strategic use of data, data analysis, text mining, social media, healthcare analytics into solutions or training packages to help companies address data related issues
  - Connecting students with corporate sponsored projects, providing opportunities for students to integrate and to apply what they have learned from different classes, to gain the experience of making professional presentations to audience with diverse background, to practice communicating with clients/supervisors, and to develop solutions with real-world impact
  - Organize an annual Business Analytics community to
    - Bring together local Business Analytics community
    - Share best practice in Business Analytics
    - Connect faculty research to local industry demand
    - Engage local community in the center activity
- Goals and Objectives:

The launching of the Center serves part of our **Regional, Reputation, Retention, and Recruit** strategy with the following goals:

  - Provide an identifiable unit to organize and deliver executive training services strongly demanded by industry. (Regional, Reputation)
  - Provide an identifiable unit for collaboration with industry on business analytics projects. (Regional, Reputation)
  - Build a platform for students to work on real world issues, enhancing their employability in the job market. This could help attract strong students to apply to the BA program. (Retention, Recruit)
  - Develop the connection between faculty research and real-world needs. This could benefit the career growth of junior faculty. At the same time, such connections could also enhance the academic reputation and social impact of our research. (Reputation)
  - Serve as an identifiable unit to attract external funds and donations. (Regional, Reputation)



## **Appendix M: Center of Excellence for Marketing and Consumer Insights**

- Vision and Mission
  - The Center's purpose is to provide experiential learning, industry outreach, and academic research to support the College of Business, Oregon State University, and Oregon's economic development.
- Strategic Plan:
  - The Center operates both as a marketing research agency as well as a hub for student and faculty development and an outward-facing entity with emphasis on business interests.
- Goals and Objectives:

Three primary objectives guide the Center's operations and development:

  - Develop young researchers for industry and academia (Teaching)
    - Skill development and training in marketing and consumer insight methodologies (including IRB Certification, Qualtrics survey construction, analysis using Excel, Tableau and SPSS software packages, research report writing, etc.).
    - Create a resource center that can provide assistance, consultation, documentation, and training to graduate and undergraduate business students that need to conduct marketing and consumer research for classes, projects, or ventures.
    - Provide a parallel environment to complement current marketing courses (i.e., MRKT 396 Marketing Research, MRKT 492 Consumer Behavior, See Appendix A) and for students seeking to gain additional experiential learning opportunities or to fulfill project or internship requirements (BA 004/410/406) in research related areas.
    - Introduce students to academic research (research assistance and gathering data).
  - Conduct external research and consulting (Outreach)
    - Provide experiential learning and internship opportunities with local, regional, and national customers.
    - Provide faculty and students networking opportunities with the community, alumni, and industry.
    - Provide alumni, community, and industry meaningful and impactful marketing and consumer research to support development and growth.
    - Create a welcome atmosphere to invite alumni, community, and industry to join in the form of classroom research projects and speakerships.
  - Academic Research Support (Research)
    - Support R1 academic research faculty through projects and industry contacts.
    - Provide faculty a continuous pool of research-ready assistants to support research activities such as data gathering and analysis.
    - Help manage and operate COB research resources (i.e., research suites, survey platforms, technology, etc.)



## Appendix N: Center for Supply Chain Excellence

- Vision and Mission Statement

The Center for Supply Chain Excellence (SCE) at the College of Business sponsors and promotes research and education in the fields of supply chain management and analytics. The mission of the Center is to be a leading source of knowledge creation, experiential learning, and dissemination in supply chain and analytics.

- Strategic Plan

The Center offers a platform for students and faculty to engage with industries in multiple ways.

- The Center replaces the current Supply Chain Learning Lab and channels projects from industries. The faculty in the Center will evaluate each project and determine the best use of them. If a project matches the curriculum of a class, it will be incorporated into the class, providing students a real-world case analysis. If a project fits a faculty's research agenda, then it may be led by the faculty who will recruit and mentor students to engage in the research. Certain projects may qualify for independent study with class credits or as internships.
- The Center provides a platform for faculty to apply for grants and collaborate with researchers within and outside the College and University. Applying for outside grants is traditionally difficult for business faculty. The collaboration with the industry through the Center allows faculty to engage in high-impact projects that are essential in the grant application.
- The Center works closely with the College and the SCLM Advisory Council by seeking and creating executive training and education programs on cutting edge topics in Supply Chain and Logistics Management. The Center will become a premier destination for expertise, in particular, for the technology-intensive firms that are central to the mission of our College.

- Goals and Objectives

- Preliminary Research & Education Themes: The Center works in conjunction with faculty members from various academic disciplines, such as Business Analytics, and across the Colleges, such as Colleges of Forestry, Agriculture, and Engineering, to conduct research and training in areas such as:
  - Supply Network Dynamics, Risks, Disruptions and Resilience
  - Green Supply Chain; Industrial Ecology
  - Environmental Management Strategy
  - Sustainable Food Systems and Agricultural Cooperatives
  - Public Procurement
  - Supply Chain Analytics and Operations management including supply management, service management, retail operations lean and quality management, international trade, supply chain financing, and forecasting



- Educational Programming: The Center supports the undergraduate (BA Option and upcoming BS Major in SCLM), MBA, Master of Science degree programs as well as the Graduate Certificate in Supply Chain and Logistics Management in the College.
  - Bachelor of Business Administration, option in Supply Chain and Logistics Management: <https://business.oregonstate.edu/online-business/supply-chain-and-logistics-management>
  - Master of Business Administration, option in Supply Chain and Logistics Management: <https://mba.oregonstate.edu/>
  - Master of Science in Business: <https://business.oregonstate.edu/master-science>
  - Graduate Certificate: <https://business.oregonstate.edu/graduate-certificates>
- Community Outreach/Engagement: The Center provides consulting, training, education, and networking on strategies, tactics, and tools of operational excellence to supporting and partner companies. In return, the Center works closely with partner companies to develop classroom projects for our students and research projects for our faculty.

## **Appendix O: Center for Advancing Financial Education (OSU CAFÉ)**

- **Vision and Mission**
  - The Oregon State University Center for Advancing Financial Education (OSU CAFÉ), housed in the College of Business (COB), provides research-based curriculum for all OSU students; and, through workshops, training, counseling, a peer mentorship program and other resources, provides services and support to students at OSU and to communities across the state.
  - Financial literacy curriculum and structured student support will help alleviate some of the issues students face around financial apprehension and uncertainty that cause them to leave OSU. The center/ will also allow us to increase retention rates, as well as provide our student population with financial literacy education that will serve them for life. The structured student support will be coordinated by CAFÉ, and leverage partnerships with the Office of Financial Aid, HSRC, and other university stakeholders and units.
- **Goals and Objectives**
  - Educational Programming: Financial Literacy Curriculum
    - **Blueprint Series: Blueprint, the College of Business Education to Career model**, is a 12-course series that guides students from campus to career. It aligns with NACE career competencies and includes layered financial literacy content. The series is a required component of every College of Business student.
    - **BA 140 (Financial Literacy for College Life):** The Center delivers an online, 2-credit, course focused on budgeting, creating an academic and financial plan to graduation, understanding billing, paying for college resources available to students based on their unique student status (international, domestic, undocumented, student athlete, Military and Veteran, etc.), and an introduction to credit. Students will also be able to choose from topics, such as, how to pay for Study Abroad, Independent Living, Cooking on a Budget, etc. This will mirror the information from the first and second year Blueprint courses, and is available to all non-COB students.
    - **BA 3XX (to be developed in FY20):** The Center delivers an OSU Baccalaureate Core (General Education), 3-credit course that focuses on credit, debt management, taxes, banking, student loan repayment, home buying, budgeting for post-graduation, analyzing job offers, understanding your benefits, etc. This will mirror the content from the third and fourth year Blueprint courses; and will be based on the curriculum that underlies the [American Association of Family & Consumer Sciences Personal and Family Finance Educator certification](#).
  - Financial Literacy Education Peer Mentorship Program
    - Through the Financial Literacy Education Peer Mentorship Program (FLEPMP) students will be trained and employed as peer mentors to provide advice about, and support for, basic financial literacy to the OSU student community. Mentors will assist professional staff in creating and delivering content around basic personal finance and paying for college topics; meet with students as a first point-of-entry on basic personal finance and paying for college topics; provide referrals for students, as needed; and serve as Teaching Assistants for BA140.
  - Service and Support Components: OSU students



- Workshops: The center will provide live and pre-recorded, in-person, or online financial literacy workshops offered to incoming COB students and families, offered within our existing new student orientations; followed by individual paying-for-college advising. These workshops can be requested through a form on our website and, if recorded, can be on a website or sent electronically.
- Financial Literacy Website: This would be a centralized website with all the things in one location with modules for the topics we cover – within the modules we can have some text, visuals, videos, and perhaps presentation templates. We can have information about our 1:1 advising, advertise courses for a deeper dive in all topics, a place to request a workshop, have an event calendar, local/national resources, etc. We can have landing pages that explains information on topics such as Financial Aid and link out as needed.
- 1-on-1 Counseling: This will be provided by the financial literacy expert(s) either in-person or remotely.
- Financial Referral Chart: The Center will keep up-to-date a Financial Referral Chart on its website to guide students to resources across campus. This will also serve as a valuable resource to campus partners (faculty, staff, advisors, etc.).
- Service and Support Components: Community
  - Pre-college Programming and Support: Including Junior Achievement at local elementary and middle schools, 4H Entrepreneurship Clubs, YEBW. These include paying-for-college workshops, college student mentors (for K-12 schools), college nights targeting underrepresented students.

## Appendix P: College of Business Merit-Based Performance Evaluation System

This Appendix details the College's system for performance measurement and evaluation of T/TT faculty activity using numerical criteria. This system is used as input to the annual T/TT faculty evaluations and merit-raises when warranted. The College performance evaluation system is intended to advance the research reputation of the College and support faculty excellence. The criteria we document and assess include the following:

1. **Annual Review Performance** – Teaching, Research, and Service
  2. **Research Productivity** during the year
  3. **Journal Editorial Board Memberships** and the quality of those journals
  4. **Editor/Associate Editor Positions** at journals and the quality of those journals
  5. **Premier and Total Publications.** We track the total number of publications and premier publications separately because they contribute differentially to the reputation of the College.
- *Annual Review Performance Assessment*
    - Teaching performance is assessed using Q1 and Q2 SET scores. To attain a score of “Meets Expectations” a faculty member must average 4.2 (on the six-point SET score range) in the courses taught. Exceptions are sometimes made based on how close the average score is to 4.2. In these instances the following are taken into account: when one class has an unusually low score (and the other classes meet expectations), when a faculty member is new with a new preparation, and when a faculty member is teaching on overload or is taking on added teaching responsibilities (such as new course development). To attain a score of “Exceeds Expectations” a faculty member must average 5.4 in the courses taught. To attain a score of “Exceptional” a faculty member must average 5.6 in the courses taught or attain an average of at least 5.4 and win a teaching award in the given year (these awards are very limited and require nominations and letters of support). The College eSET scores are evaluated annually and adjustments in targets are made as needed to account for structural differences (e.g., gender, course level, class size).
    - Research is evaluated based on journal acceptances (and significant grants) over the last three years with the most recent year having the strongest influence on performance. The College uses the Association of Business Schools (ABS) Academic Journal Guide ranking system, a norm among AACSB accredited schools. In the ABS ranking system, journals are ranked from 1 (lowest) to 4\* (premier). Journals with a rank of 3 are considered “high impact” in the College of Business and help to build the reputation of the College. Journals with a rank of 4 are near premiers while those with a rank of 4\* are generally considered universal premiers. To attain a score of “Meets Expectations” in research, a faculty member must get two journal acceptances every three years. This level of performance will ensure that the faculty member is maintaining a “Scholarly Academic” (SA) rating according to AACSB standards. To get a score above “Meets Expectations” a faculty member must either get multiple acceptances in journals rated 4 or higher or the faculty member must get an acceptance in a premier journal in the most recent year. An acceptance in a premier journal provides an “Exceptional” rating on research performance in the year of the acceptance.
    - Service is evaluated based on the breadth and depth of the respective faculty member's service while considering the rank of the respective faculty member. It is expected that all



faculty members will exhibit internal service to the College and/or discipline. Moreover, it is expected that faculty at higher ranks will perform service to the University and the Profession. We encourage assistant professors to begin increasing their professional service (such as ad hoc reviewing and conference reviewing). To attain a score of “Exceeds Expectations” a faculty member must exhibit breadth and depth of service including important leadership roles in this service. To attain a score of “Exceptional” a faculty member must exhibit multiple leadership roles in important service.

- Research Productivity Template
  - The College uses a scoring system (Research Activity Template) developed in collaboration with the College Research Committee. The template provides faculty the opportunity to report the work that they have accomplished on their manuscripts during the past year. Faculty members complete the Research Activity Template and submit it at the time of the annual review (at the beginning of the spring quarter). The scoring system is intended to evaluate the effort of faculty members in addition to outcomes. Points are awarded based on new manuscript submissions, revised manuscript resubmissions, and final acceptances. For revised manuscript resubmissions and final acceptances, points are awarded based on how far along in the review process a manuscript goes during the year and the quality of the journal (i.e. a new submission receives fewer points compared to a resubmission after the first round which receives fewer points compared to a resubmission after a second round of review). Research activity is normed by discipline and peer schools. College leadership uses the Research Activity Template as a tool to inform decision making on teaching loads, service loads, mentoring and performance evaluations.
- Journal Editorial Board Memberships
  - We strongly encourage our faculty to pursue journal editorial board memberships. We particularly encourage assistant professors to seek out ad hoc reviewing opportunities at impactful (ABS 3) or better journals with the hope that these will lead to editorial board invitations. We emphasize the importance of doing excellent reviews for journals when given the opportunity. We believe that this will assist junior faculty in expanding their network with select editors and associate editors in their field which will create co-author and letter-writer networks. Our faculty currently hold 45 editorial board positions. The average ABS rank of the journals is 3.2.
- Editor and Associate Editor Positions
  - We believe that editor and associate editor positions at impactful journals greatly enhance the reputation of the College of Business and we encourage our strong scholars to pursue these positions. The College supports faculty who perform this type of service with lower teaching loads and administrative assistance depending on the quality of the journal and the editorial position. Our faculty currently hold 11 editor or associate editor positions. The average ABS rank of the journals is 2.89.
- Premier Publications
  - Prior to 2015, the College of Business did not place great emphasis on research quality and did not have firm expectations for promotion and tenure based on research quality. Since 2015, the College adopted expectations of research excellence. Because premier publications are so vital to enhancing the reputation of the College, we established the



Prominent Scholar Award that is tied to publication in premier journals. The following table displays the improvement in faculty research since our last accreditation visit.

Year	Average hIndex	Average i10Index	Average Citations	Scholars	Articles	Articles Per Scholar
2014	6.41	7.35	493	44	195	4.4
2018	9.17	9.58	953	50	250	5.0
% change	43%	30%	93%	14%	28%	

	Impactful Articles	Tier 1 or 2 Articles	% Impactful	% Tier 1 or Tier 2	Articles Per Scholar
2009-13	63	28	52%	23%	3.2
2014-18	131	76	63%	36%	3.8
% change	108%	171%	21%	57%	18%

- Closing the Loop – Evaluation and Continuous Improvement
  - In order to close the loop and continuously improve our merit based performance evaluation system, we annually evaluate determinants of faculty pay relative to the market. As part of this analysis, we benchmark against a 24 peer-school comparison set using the AACSB aggregate data. These 24 schools are what we would consider as peers and near aspirants -- they are similar in terms of any two of the following: similar size, land-grant state school, PhD program, R-1 research institution. The AACSB data provides the mean and median salaries by rank and by discipline. We used this data in aggregate to evaluate our aggregate pay by discipline and rank. Our goal is to assess our aggregate pay by discipline and rank to our peer group.
  - The College was substantially below the mean and median in 2015. Since 2015, the College has made significant progress and now sits very close to the mean and median, with some exceptions each year that we work to address through compensation and hiring. The most recent analysis revealed some areas of needed improvement that we sought to address with the latest pay raise. The analysis also revealed areas where faculty pay is sufficient.