

Oregon State University
Strategic Plan for the 21st Century
Performance Metrics

Goal 1: Academic Excellence

| Metric # | Metric | Peer Mean | | | | | | | OSU | | | | | | | Target 2012-13 (As Set in 2009) |
|------------|--|---------------------------|---------------------------|---------------------------|---------------------------|---------------------------|---------------------------|---------------|------------------------|-------------------------|------------------------|-------------------------|-------------------------|-------------------------|-------------------------|---------------------------------|
| | | AY/FY 2002-03 | AY/FY 2003-04 | AY/FY 2004-05 | AY/FY 2005-06 | AY/FY 2006-07 | AY/FY 2007-08 | AY/FY 2008-09 | AY/FY 2002-03 | AY/FY 2003-04 | AY/FY 2004-05 | AY/FY 2005-06 | AY/FY 2006-07 | AY/FY 2007-08 | AY/FY 2008-09 | |
| 1.1 | Total R&D Expenditures | \$510.3 M | \$538.7 M | \$570.6 M | \$587.8 M | \$610.3 M | - | - | \$208.1 M | \$207.2 M | \$218.0 M | \$227.7 M | \$231.9 M | \$233.4 M | Jan-10 | \$296.6 M |
| 1.1.N1 | Total R&D Expenditures per T/TT Faculty | \$331,389 | \$316,152 | \$332,056 | \$338,338 | \$344,401 | - | - | \$211,724 | \$236,801 | \$251,730 | \$260,817 | \$278,720 | \$293,163 | Mar-10 | - |
| 1.1.N2 | Total R&D Expenditures per State Appropriated Dollar | 1.30 | 1.44 | 1.52 | 1.54 | 1.58 | - | - | 1.60 | 1.56 | 1.67 | 1.62 | 1.59 | 1.35 | Mar-10 | - |
| 1.1.X1 | Industry Research as Percent of Total R&D Expenditures | 6.2% | 6.2% | 6.3% | 6.8% | 7.3% | - | - | .2% | 1.3% | 1.0% | 1.5% | 1.4% | 1.4% | Jan-10 | - |
| 1.1.X2 | Invention Disclosures ¹ | 182 | 209 | 215 | 227 | 220 | - | - | 39 | 36 | 41 | 49 | 54 | 70 | 50 | - |
| 1.1.X3 | Revenue from Licensing / Revenue per \$1M Expenditures ¹ | \$10.1 M / \$19,638 | \$13.1 M / \$23,985 | \$11.4 M / \$19,856 | \$8.7 M / \$14,415 | \$9.4 M / \$11,189 | - | - | \$1.3M / \$8,550 | \$1.5M / \$8,622 | \$1.9M / \$10,583 | \$2.1M / \$11,243 | \$2.1M / \$11,351 | \$2.3M / \$12,476 | \$2.4M / Jan-10 | - |
| 1.1.X4 | Business Start-Ups ¹ | 4 | 6 | 5 | 7 | 5 | - | - | 0 | 1 | 0 | 2 | 4 | 5 | 4 | - |
| 1.2 | Total Degrees Granted | 9,092 | 9,322 | 9,427 | 9,419 | 9,529 | 9,579 | - | 3,894 | 4,113 | 4,213 | 4,294 | 4,222 | 4,232 | 4,253 | 4,566 |
| 1.2.X1 | Bachelors / Masters/ Doctorates / First Professionals | 6,599 / 1,686 / 486 / 321 | 6,695 / 1,808 / 488 / 332 | 6,770 / 1,787 / 517 / 354 | 6,813 / 1,712 / 550 / 344 | 6,851 / 1,731 / 591 / 356 | 6,882 / 1,748 / 597 / 352 | - | 2,944 / 692 / 169 / 89 | 3,078 / 760 / 172 / 103 | 3,177 / 778 / 159 / 99 | 3,351 / 659 / 166 / 118 | 3,294 / 621 / 179 / 128 | 3,267 / 674 / 173 / 118 | 3,300 / 648 / 178 / 127 | - |
| 1.2.X2 | Ratio of of Undergraduate to Grad-First Prof Students / Ratio of of Undergraduate to Grad Students | 3.6 / 4.1 | 3.4 / 3.9 | 3.4 / 3.9 | 3.5 / 4.2 | 3.5 / 4.2 | 3.5 / 4.2 | 3.6 / 4.4 | 4.6 / 5.1 | 4.6 / 5.2 | 4.6 / 5.2 | 4.5 / 5.3 | 4.5 / 6.4 | 4.6 / 5.4 | 4.6 / 5.4 | - |
| 1.3 | Percent of High-Achieving Oregon High School Graduates | - | - | - | - | - | - | - | 30.5 | 30.9 | 31.6 | 33.7 | 32.8 | 32.7 | 32.6 | 35.0 |
| 1.3.X1 | Graduation Rate Performance | 6 | 7 | 7 | 6 | 5 | 5 | Aug-10 | -3 | 4 | 6 | 4 | 5 | 7 | Aug-10 | - |
| 1.4 | External Funds Generated per State Dollar Invested in AES and FRL | - | - | - | - | - | - | - | 1.73 | 1.89 | 1.98 | 1.98 | 1.87 | 1.70 | 1.89 | 1.75 |

Strategic Planning Peers: University of Arizona; University of California - Davis; Cornell University; University of Illinois - Urbana/Champaign; Michigan State University; Ohio State University - Columbus; Pennsylvania State University - University Park; Purdue University - West Lafayette; Texas A & M University - College Station; and University of Wisconsin - Madison

¹ For OSU, "Invention Disclosures", "Revenue from Licensing / Revenue per \$1M Expenditures", and "Business Start-Ups" data for FY 2005 and 2006 are reported based on fiscal year, while data for 2002-03 and 2003-04 are based on calendar years. This change was made for '05 and subsequent so that the numbers correspond to the data period requested by the annual Association of University Technology Managers (AUTM) survey, completed by the OSU Office of Technology Transfer.

Note: All dates that are entered instead of data are the estimated month and year when the data are expected to be made available to the Office of Academic Planning and Assessment

"TBA" - To Be Announced

Oregon State University
Strategic Plan for the 21st Century
Performance Metrics

Goal 2: Improve the teaching and learning

| Metric # | Metric | Peer Mean | | | | | | | OSU | | | | | | | Target 2012-13 (As Set in 2009) |
|----------|--|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|--|
| | | AY/FY 2002-03 | AY/FY 2003-04 | AY/FY 2004-05 | AY/FY 2005-06 | AY/FY 2006-07 | AY/FY 2007-08 | AY/FY 2008-09 | AY/FY 2002-03 | AY/FY 2003-04 | AY/FY 2004-05 | AY/FY 2005-06 | AY/FY 2006-07 | AY/FY 2007-08 | AY/FY 2008-09 | |
| 2.1 | First-Year Retention Rate and Gap | 88.8% / 11.4% | 89.1% / 8.5% | 89.6% / 7.7% | 89.8% / 9.9% | 90.1% / 7.0% | 90.1% / 4.9% | Jul-10 | 80.7% / 17.4% | 80.7% / 16.5% | 80.3% / 9.3% | 80.9% / 12.2% | 81.3% / 8.2% | 80.8% / 13.5% | Jul-10 | 85.0% |
| 2.2 | Six-Year Graduation Rate and Gap | 72.5% / 20.9% | 72.8% / 17.0% | 74.7% / 25.5% | 76.2% / 18.7% | 76.0% / 17.8% | 77.2% / 19.4% | Jul-10 | 60.5% / 24.9% | 60.4% / 22.1% | 61.5% / 37.0% | 60.0% / 28.2% | 60.9% / 25.9% | 62.1% / 19.6% | Jul-10 | 65.0% |
| 2.3 | U.S. Minority Students as a Percentage of Total Students | 18.3% | 18.7% | 19.2% | 19.7% | 20.2% | 20.9% | 21.5% | 13.0% | 13.5% | 13.6% | 14.1% | 14.3% | 15.0% | 15.8% | 18.0% |
| 2.4 | U.S. Minority as a Percentage of Total Faculty | - | 15.1% | - | 16.2% | 16.5% | 16.9% | 17.5% | 9.2% | 9.7% | 10.1% | 11.1% | 12.2% | 12.8% | 13.4% | 15.0% |
| 2.5 | International Students as a Percentage of Total Students | 8.6% | 8.6% | 8.4% | 8.1% | 8.1% | 9.2% | 9.7% | 6.6% | 6.0% | 5.2% | 4.9% | 4.8% | 4.7% | 4.9% | - |
| 2.5.X1 | Student/Faculty FTE Ratio | 16.2 | 16.3 | 16.0 | 15.9 | 16.0 | 15.6 | 15.9 | 21.0 | 24.5 | 19.0 | 19.0 | 19.0 | 17.5 | 19.0 | - |
| 2.5.X2a | Level of Academic Challenge (NSSE): 1st Year / Senior | - | - | - | - | - | - | - | - | 48.7 / 53.0 | 44.9 / 54.5 | - | 48.5 / 54.3 | - | - | - |
| 2.5.X2b | Enriching Educational Experiences (NSSE): 1st Year / Senior | - | - | - | - | - | - | - | - | 23.4 / 34.6 | 24.0 / 35.6 | - | 25.5 / 36.5 | - | - | - |
| 2.5.X3 | Percent of Undergraduates Receiving Pell Grants | 18.7% | 20.5% | 20.2% | 20.5% | 20.2% | - | - | 27.8% | 28.6% | 29.9% | 28.8% | 27.7% | - | - | - |
| 2.5.X4 | People involved in Designed Learning Experiences through O&E | - | - | - | - | - | - | - | - | - | - | - | - | - | 2.3 M | - |

Notes: NSSE data are available for AY 2004, 2005, and 2007.

Goal 3: Substantially increase revenues.

| Metric # | Metric | Peer Mean | | | | | | | OSU | | | | | | | Target 2012-13 (As Set in 2009) |
|----------|--|---------------------|---------------------|---------------------|--------------------|--------------------|------------------|------------------|------------------|------------------|-------------------|-------------------|-------------------|-------------------|------------------|--|
| | | AY/FY 2002-03 | AY/FY 2003-04 | AY/FY 2004-05 | AY/FY 2005-06 | AY/FY 2006-07 | AY/FY 2007-08 | AY/FY 2008-09 | AY/FY 2002-03 | AY/FY 2003-04 | AY/FY 2004-05 | AY/FY 2005-06 | AY/FY 2006-07 | AY/FY 2007-08 | AY/FY 2008-09 | |
| 3.1 | Total R&D Expenditures ¹ | \$510.3 M | \$538.7 M | \$570.6 M | \$587.8 M | \$610.3 M | - | - | \$208.1 M | \$207.2 M | \$218.0 M | \$227.7 M | \$231.9 M | \$233.4 M | Jan-10 | \$296.6 M |
| 3.1.X | Revenue from Licensing / Revenue per \$1M Expenditures | \$10.1 M / \$19,638 | \$13.1 M / \$23,985 | \$11.4 M / \$19,856 | \$8.7 M / \$14,415 | \$9.4 M / \$11,189 | TBA | Jul-10 | \$1.3M / \$8,550 | \$1.5M / \$8,622 | \$1.9M / \$10,583 | \$2.1M / \$11,243 | \$2.1M / \$11,351 | \$2.3M / \$12,476 | \$2.4M / Jan-10 | - |
| 3.2 | Annual Private Giving | \$168.9 M | \$153.8 M | \$189.1 M | \$166.0 M | \$182.3 M | Dec-09 | Dec-10 | \$29.3 M | \$51.9 M | \$64.3 M | \$67.6 M | \$57.9 M | \$91.1 M | \$71.3 M | \$92.0 M |
| 3.2.N | Annual Private Givings per State Appropriated Dollar | .40 | .41 | .54 | .44 | .49 | Dec-09 | Dec-10 | .23 | .39 | .49 | .48 | .40 | .53 | Mar-10 | - |
| 3.2.X1 | Composite Endowment Market Value | \$1,120.4 M | \$1,315.6 M | \$1,577.1 M | \$1,777.3 M | \$2,134.4 M | Dec-09 | Dec-10 | \$273.3 M | \$318.5 M | \$351.8 M | \$383.4 M | \$441.2 M | \$428.4 M | \$327.0 M | - |
| 3.2.X2 | Ratio of operating expenses for Instruction, Academic Support (including Libraries) and Student Services to all education and general expenditures | .43 | .42 | .42 | .42 | .44 | .45 | - | .38 | .40 | .40 | .41 | .48 | .48 | - | - |

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Oregon State University
Strategic Plan for the 21st Century
Performance Metrics

Goal 1: Academic Excellence

| Metric # | Metric | Source | Definition |
|----------|--|---|---|
| 1.1 | Total R&D Expenditures ¹ | National Science Foundation: Survey of Research and Development Expenditures at Universities and Colleges | Total research and development expenditures at universities and colleges for a specific fiscal year. The NSF data refer to science and engineering expenditures for separately budgeted Research & Development. Separately budgeted research and development (R&D) expenditures include all funds expended for activities specifically organized to produce research outcomes and commissioned by an agency either external to the institution or separately budgeted by a unit of the organization. Included are expenditures for research equipment purchased under research project awards from current fund accounts. Also included are research funds for which an outside organization, educational or otherwise, is a subrecipient. Excluded are training grants, public service grants, demonstration grants, and departmental research expenditures that are not separately budgeted. For the R&D expenditures survey, science and engineering (S&E) refers to disciplines in the fields of: Engineering, Physical Sciences, Mathematics, Computer Sciences, Life Sciences, Psychology, and Social Sciences. A list of S&E fields and discipline names is available. Non-science fields include education, law, humanities, music, the arts, physical education, and library science. |
| 1.1.N1 | Total R&D Expenditures per T/TT Faculty ¹ * | National Science Foundation Academic Research and Development Expenditures report; IPEDS: Fall Employees by Assigned Position Survey, Employees by Faculty Status, Primary Function/Occupational Activity Table (the "Full-time Tenure and Tenure Track Faculty Headcount" data source) | Total research and development expenditures at universities and colleges for a specific fiscal year divided by full-time Tenure and Tenure Track Faculty headcount. The NSF data refer to science and engineering expenditures for separately budgeted Research & Development. All NSF related metrics include data for all campuses affiliated with Cornell University, Pennsylvania State University, Ohio State University, Texas A & M University (except the Corpus Cristi, Commerce, and Kingsville campus), and Purdue University. The Tenure/Tenure-Track Faculty data includes all tenure/tenure-track faculty at the various campuses of the peer institutions. Since the exact campuses included in the NSF data are not available, the campuses selected from the IPEDS Tenure/Tenure-Track Faculty data may not be the same as those included in the NSF data. |
| 1.1.N2 | Total R&D Expenditures per State Appropriated Dollar | National Science Foundation Academic Research and Development Expenditures report; IPEDS: Fiscal Year Finance Survey, Public Institutions - GASB 34/35 Table, Revenues and Other Additions Section (State Appropriations source) | Total research and development expenditures at universities and colleges for a specific fiscal year divided by state appropriations. IPEDS defines state appropriations as the amounts received by the institution through acts of a state legislative body, except grants and contracts and capital appropriations. Funds reported in this category are for meeting current operating expenses, not for specific projects or programs. |
| 1.1.X1 | Industry Research as Percent of Total R&D Expenditures | National Science Foundation Academic Research and Development Expenditures report | Industry research includes all awards for R&D (including direct and reimbursed indirect costs) from profit-making organizations, whether engaged in production, distribution, research, service, or other activities. In this metric, it is represented as a percentage of total R&D expenditures. |

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Performance Metrics

Goal 1 Continued

| Metric # | Metric | Source | Definition |
|----------|--|---|--|
| 1.1.X3 | Revenue from Licensing | Association of University Technology Managers (AUTM) Licensing Survey | Licensing Revenue is LICENSE INCOME RECEIVED. LICENSE INCOME RECEIVED includes: license issue fees, payments under options, annual minimums, running royalties, termination payments, the amount of equity received when cashed-in, and software and biological material end-user license fees equal to \$1,000 or more, but not research funding, patent expense reimbursement, a valuation of equity not cashed-in, software and biological material end-user license fees less than \$1,000, or trademark licensing royalties from university insignia. License Income also does not include income received in support of the cost to make and transfer materials under Material Transfer Agreements. Revenue is based on fiscal year. The numbers for OSU's peer institutions, as reported by AUTM, include Purdue Research Foundation instead of Purdue University-West Lafayette; Cornell Research Foundation instead of Cornell University-Ithaca. Therefore, these reported numbers are used in place of the corresponding OSU peer institution to calculate the peer mean. University of Arizona may include numbers for its medical school. The number for U. of Illinois include numbers for both the Chicago and Urbana-Champaign location. The numbers for Texas A&M University System and the University of California System were not included in the peer mean. |
| | Revenue per \$1M Expenditures | Association of University Technology Managers (AUTM) Licensing Survey | Revenue from Licensing divided by the "total sponsored research expenditures" as referred to in the AUTM Licensing Survey: Final Report or the "total research spending" as referred to in the "Licensing Revenues and Patent Activity" table on the Chronicle of Higher Education Website. The sponsored research expenditures number provided to AUTM for OSU in 2003 was the total less the unreimbursed indirect costs and related sponsored research (item d.2.). Unreimbursed indirect costs is the difference between our negotiated rate and what the sponsors actually reimbursed OSU. Other related sponsored research is cost share. The 2004 and 2005 sponsored research numbers were the bottom line off the NSF survey that includes everything listed on that survey. Thus, for 2004, 2005, and subsequent years, the numbers are the same as the numbers submitted to the National Science Foundation for the "Total Academic R&D Expenditures". |
| 1.1.X4 | Business Start-Ups | Association of University Technology Managers (AUTM) Licensing Survey | Institutions Start-ups or SPin-Offs are new companies that were dependent on licensing the institution's technology for their formation |
| 1.2 | Total Degrees Granted | IPEDS | |
| 1.2.X1 | Bachelors / Masters/ Doctorates / First Professionals | | Degrees (Bachelor, Master, M.A.I.S., First Professional, and Doctorate) received by OSU students during the academic year. |
| 1.2.X2 | Ratio of of Undergraduate to Grad-First Prof Students / Ratio of of Undergraduate to Grad Students | Common Data Set | Student enrollment by categories as of the Institution's official Fall reporting data or as of October 15. Grad-First Prof Students includes graduate and first professional students. |
| 1.3 | Percent of High-Achieving Oregon High School Graduates | Oregon University System | Percentage of newly admitted freshmen from Oregon high schools with a GPA of 3.75 or higher |
| 1.3.X1 | Graduation Rate Performance | U.S. News and World Report | The difference between the actual six-year graduation rate for students entering in Fall term and the predicted graduation rate. The predicted graduation rate is based upon characteristics of the entering class, as well as characteristics of the institution. If a school's actual graduation rate is higher than the predicted rate, then the school is enhancing achievement or is outperforming. |
| 1.4 | External Funds Generated per State Dollar Invested in AES and FRL | OSU College of Agricultural Sciences and College of Forestry | External research funds – External funds generated per state dollar invested in the Agricultural Experiment Station and the Forest Research Laboratory. Other funds include gifts, grants, contracts, federal and county funds. |

Oregon State University
Strategic Plan for the 21st Century
Performance Metrics

Goal 2: Improve the teaching and learning

| Metric # | Metric | Source | Definition |
|----------|--|---|--|
| 2.1 | First-Year Retention Rate and Gap | CSRDE (Oklahoma State University) | Percentage of all first-time, degree-seeking, full-time undergraduates continuing their education at the same institution one year following their initial enrollment. Fall 2002 cohort for AY2002-03, Fall 2007 cohort for AY2007-08. The gap is the largest and smallest rate difference between the U.S. Minority groups (American Indian, Asian, African American, Hispanic, White/Non-Hispanic). |
| 2.2 | Six-Year Graduation Rate and Gap | CSRDE (Oklahoma State University) | Percentage of all first-time, degree-seeking, full-time undergraduates in a cohort graduating from the same institution within six years of initial enrollment. Fall 1997 cohort for AY2002-03, Fall 2002 cohort for AY2007-08. The gap is the largest and smallest rate difference between the U.S. Minority groups (American Indian, Asian, African American, Hispanic, White/Non-Hispanic). |
| 2.3 | U.S. Minority Students as a Percentage of Total Students | IPEDS Enrollment Survey | Percentage of grand total of men and women enrolled for credit who designate themselves as Black, non-Hispanic; Hispanic; Asian or Pacific Islander; or Native American or Alaska Native. Based on enrollment of fourth week of Fall term of a given academic year. |
| 2.4 | U.S. Minority as a Percentage of Total Faculty | OUS for 2002-2003 and 2004-2005 data; IPEDS Fall Staff Survey for 2003-2004 and 2005-2006 data; Human Resources Survey for 2006-2007, and subsequent years. | Number of professors, associate professors, assistant professors, and instructors who designate themselves as Black non-Hispanic; Hispanic; Asian or Pacific Islander; or American Indian/Alaska Native divided by total full-time faculty, presented as a percentage. Faculty counts include: tenured, non-tenured on tenure track, not on tenure track/no tenure system faculty. Based on Fall term of a given academic year. |
| 2.5 | International Students as a Percentage of Total Students | IPEDS Enrollment Survey | Percentage of grand total of men and women enrolled for credit who are not citizens or nationals of the United States and who are in the country on a visa or temporary basis and do not have the right to remain indefinitely. Based on enrollment of fourth week of Fall term of a given academic year. |
| 2.5.X1 | Student/Faculty FTE Ratio | Common Data Set | Ratio of full-time equivalent students (full-time plus 1/3 part-time) to full-time equivalent instructional faculty (full-time plus 1/3 part-time). Excludes both faculty and students in stand-alone graduate or professional programs such as medicine, law, veterinary, dentistry, social work, business, or public health in which faculty teach virtually only graduate level students. Also excludes undergraduate or graduate student teaching assistants as faculty. |
| 2.5.X2a | Level of Academic Challenge (NSSE): 1st Year / Senior | National Survey of Student Engagement | Challenging intellectual and creative work is central to student learning and collegiate quality. College and universities promote high levels of student achievement by emphasizing the importance of academic effort and setting high expectations for student performance: Preparing for class (studying, reading, writing, rehearsing, etc. related to academic programs); Number of assigned textbooks, books, or book-length packs of course readings; Number of written papers or reports of 20 pages or more; number of written papers or reports of between 5 and 19 pages; and number of written papers or reports of fewer than 5 pages; Coursework emphasizing analysis of the basic elements of an idea, experience or theory; Coursework emphasizing synthesis and organizing of ideas, information, or experiences into new, more complex interpretations and relationships; Coursework emphasizing the making of judgments about the value of information, arguments, or methods; Coursework emphasizing application of theories or concepts to practical problems or in new situations; Working harder than you thought you could to meet an instructor's standards or expectations; and Campus environment emphasizing time studying and on academic work. |

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Performance Metrics

Goal 2 Continued

| Metric | Source | Definition | |
|---------|--|---|--|
| 2.5.X2b | Enriching Educational Experiences (NSSE): 1st Year / Senior | National Survey of Student Engagement | Complementary learning opportunities enhance academic programs. Diversity experiences teach students valuable things about themselves and others. Technology facilitates collaboration between peers and instructors. Internships, community service, and senior capstone courses provide opportunities to integrate and apply knowledge: Participating in co-curricular activities (organizations, publications, student government, sports, etc.); Practicum, internship, field experience, or clinical assignment; Community service or volunteer work; Foreign language coursework & study abroad; Independent study or self-designed major; Culminating senior experience (capstone course, senior project or thesis, comprehensive exam, etc.); Serious conversations with students of different religious beliefs, political opinions, or personal values; Serious conversations with students of a different race or ethnicity; Using electronic technology to discuss or complete an assignment; Campus environment encouraging contact among students from different economic, social, and racial or ethnic backgrounds; Participate in a learning community or some other formal program where groups of students take two or more classes together. |
| 2.5.X3 | Percent of Undergraduates Receiving Pell Grants | The Education Trust (http://www2.edtrust.org/edtrust) | Percent of Undergraduates Receiving Pell Grants: This is the number of undergraduates receiving Pell Grants in the 2006-2007 academic year, divided by the total number of undergraduates (excluding nonresident aliens and non-degree-seeking undergraduates) enrolled in Fall 2006. The Pell recipient data come from a file from The U.S. Department of Education's Office of Postsecondary Education (OPE), and were provided to The Education Trust by Postsecondary Education Opportunity (www.postsecondary.org). The enrollment data used in the calculations come from IPEDS. Some multi-campus university systems report Pell Grant data at a consolidated, multi-institution level, and therefore, accurate campus-level counts of the number of students receiving Pell Grants were not included in the OPE file. This phenomenon affects approximately 40 of the campuses in our database, but about 25 of these campuses reported their Pell Grant data to us directly. For the remainder of these schools (e.g. the Pennsylvania State University system), The Education Trust substituted Average Percent Federal Aid (per IPEDS) for the Percentage of Undergraduates Receiving Pell. Additionally, the OPE file lacks Pell Grant data for approximately 40 additional schools for reasons other than consolidated reporting. In these cases, the percentage of students receiving federal grant aid (per IPEDS) was also substituted by the Education Trust. |
| 2.5.X4 | People involved in Designed Learning Experiences through O&E | OSU Extension Service | A designed learning experience consists of either a direct, face-to-face educational consultation or event (workshop, short course, symposia, conference) where university-based knowledge is transmitted or the equivalent learning experience through online or other electronic communication intended to match learner need with relevant knowledge. Learning experiences generally involve one hour or more of interaction with faculty and/or material. Learning experiences are generally <i>not</i> counts of web page hits or number of people reached with mass media such as newspaper, radio or television. |

Oregon State University
Strategic Plan for the 21st Century
Performance Metrics

Goal 3: Substantially increase revenues.

| Metric # | Metric | Source | Definition |
|----------|--|--|--|
| 3.1 | Total R&D Expenditures ¹ | see metric 1.1 | see metric 1.1 |
| 3.1.X | Revenue from Licensing / Revenue per \$1M Expenditures | see metric 1.1.X3 | see metric 1.1.X3 |
| 3.2 | Annual Private Giving | The Center: The Top American Research Universities; OSU Foundation | The annual giving data include all contributions actually received during the institution's fiscal year in the form of cash, securities, company products, and other property from alumni, non-alumni individuals, corporations, foundations, religious organizations, and other groups. Not included in the totals are public funds, earnings on investments held by the institution, and unfulfilled pledges. Primary Source of <i>The Center</i> annual giving data: Council for Aid to Education's Voluntary Support of Education (VSE) Survey |
| 3.2.N | Annual Private Givings per State Appropriated Dollar | The Center: The Top American Research Universities and OSU Foundation; IPEDS: Fiscal Year Finance Survey, Public Institutions - GASB 34/35 Table, Revenues and Other Additions Section (State Appropriations source) | Annual Giving divided by state appropriations. IPEDS defines state appropriations as the amounts received by the institution through acts of a state legislative body, except grants and contracts and capital appropriations. Funds reported in this category are for meeting current operating expenses, not for specific projects or programs. |
| 3.2.X1 | Composite Endowment Market Value | The Center: The Top American Research Universities; OSU Foundation | Endowment market values as of June 30th of the reported year. Primary Source of <i>The Center</i> endowment data: NACUBO Endowment Study |
| 3.2.X2 | Ratio of operating expenses for Instruction, Academic Support (including Libraries) and Student Services to all education and general expenditures | Institution's Annual Audited Financial Statements | The following is the calculation for 'Ratio of operating expenses for Instruction, Academic Support (including Libraries) and Student Services to all education and general expenditures': $(\text{Instruction} + \text{Academic Support} + \text{Student Services}) / ((\text{Total Operating Expenses} - \text{Auxiliary Enterprises}) + \text{Hospital/Medical Expenses}) + \text{Abs}(\text{Interest Expense})$. The items included in the calculation are taken from the institution's annual financial statements. |