

UNDERGRADUATE STRATEGIC ENROLLMENT PLAN



Portland State
UNIVERSITY



STRATEGIC ENROLLMENT PLAN TASK FORCE & ACKNOWLEDGEMENTS

Over the course of five months during winter and spring 2020, representatives from across the university met regularly and collaborated on the following report and recommendations. This report would not have been possible without these talented PSU faculty and staff.

Chuck Knepfle
Vice President for Enrollment Management (Chair)

Amanda Bierbrauer
Associate Vice President for Student Finances

David Burgess
Associate Director, Office of Institutional Research and Planning

LeRoy Bynum
Dean College of the Arts and Professor of Music

Derek Davis
Assistant Budget Director, Finance and Administration

Linda George
Professor of Environmental Science & Management and Interim Executive Director, University Studies

Laura Hickman
Professor of Criminology & Criminal Justice and Interim Associate Dean, College of Urban & Public Affairs

David Maddox
Interim Vice Provost for Academic Budget & Planning, Office of Academic Affairs

Perla Pinedo
Interim Assistant Vice President of Diversity & Multicultural Student Services and Director of Multicultural Retention Services

Julie Smith
Director of Marketing, University Communications

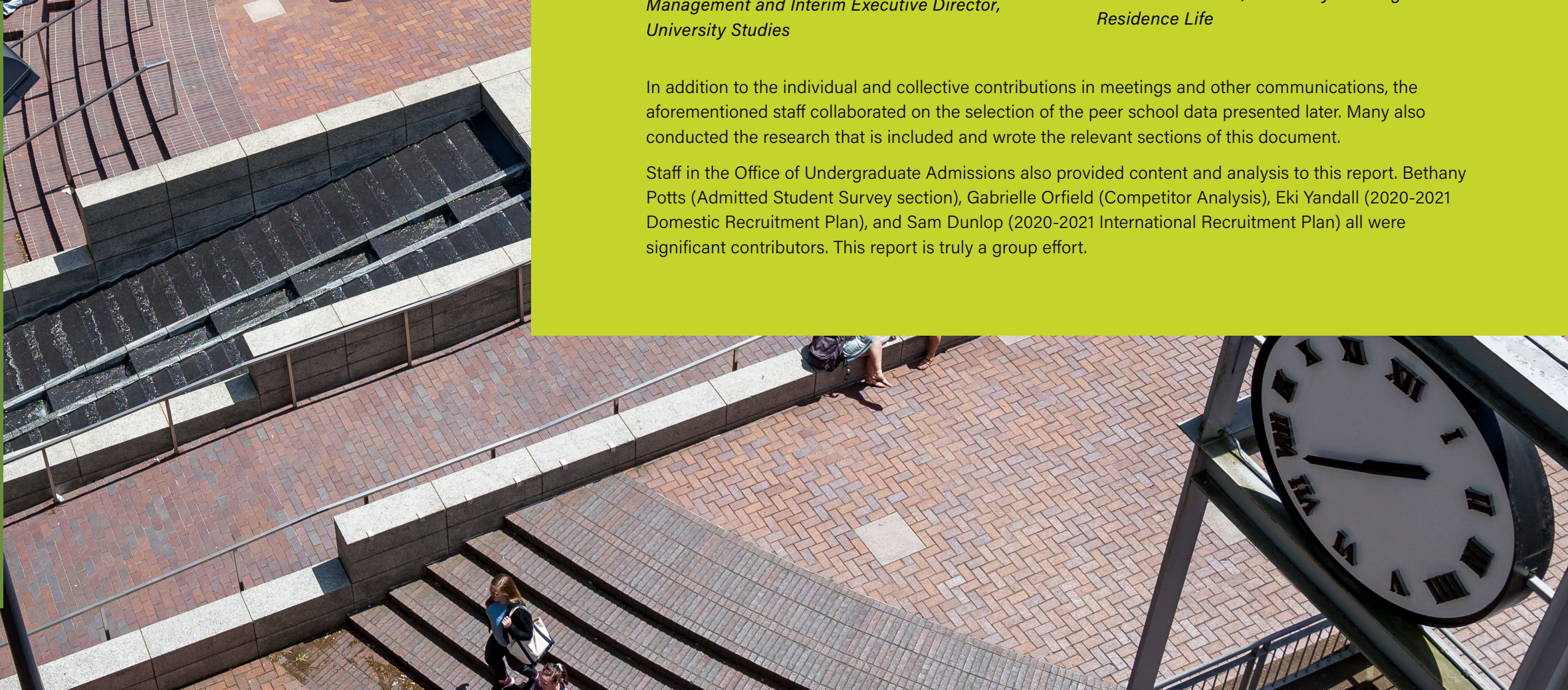
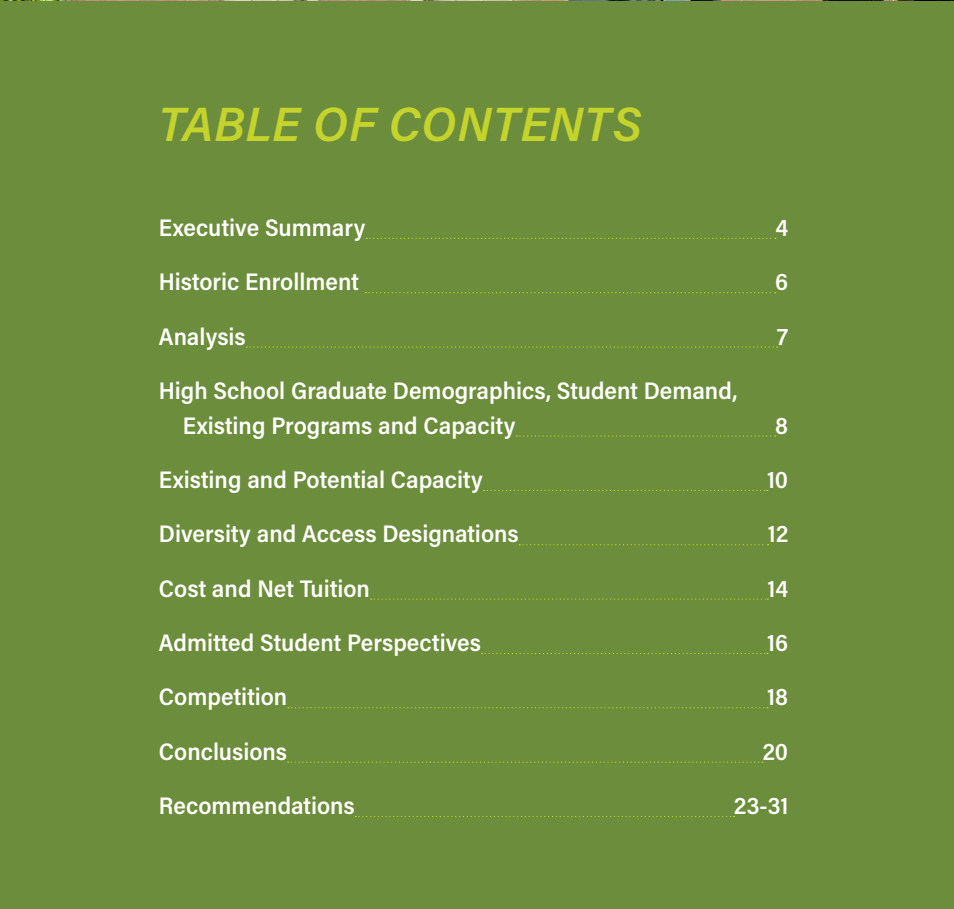
Mike Walsh
Executive Director, University Housing and Residence Life

In addition to the individual and collective contributions in meetings and other communications, the aforementioned staff collaborated on the selection of the peer school data presented later. Many also conducted the research that is included and wrote the relevant sections of this document.

Staff in the Office of Undergraduate Admissions also provided content and analysis to this report. Bethany Potts (Admitted Student Survey section), Gabrielle Orfield (Competitor Analysis), Eki Yandall (2020-2021 Domestic Recruitment Plan), and Sam Dunlop (2020-2021 International Recruitment Plan) all were significant contributors. This report is truly a group effort.

TABLE OF CONTENTS

Executive Summary	4
Historic Enrollment	6
Analysis	7
High School Graduate Demographics, Student Demand, Existing Programs and Capacity	8
Existing and Potential Capacity	10
Diversity and Access Designations	12
Cost and Net Tuition	14
Admitted Student Perspectives	16
Competition	18
Conclusions	20
Recommendations	23-31





EXECUTIVE SUMMARY

Portland State University is a vibrant, thriving urban university. Set in downtown Portland, Oregon, it is an anchor institution that is well positioned to grow and thrive. However, PSU must reverse a multi-year trend of declining enrollment. To do this, the university must set clear, attainable enrollment goals and develop a set of immediate and long-term steps to attain those goals. This report offers a data-informed path to stabilizing and ultimately increasing undergraduate enrollment at PSU.

These recommendations take into account a wide range of key indicators, including historic enrollment trends, high school demographics, student demands, course offerings, activities at peer institutions, and an in-depth analysis of the institution's strengths, weaknesses, opportunities, and threats. In many ways these indicators paint a picture of challenging times ahead for higher education nationwide, but a promising path for PSU.

The number of college-bound high school graduates is shrinking in most parts of the country. College-bound students are more price sensitive and frequently seek out specific programs that are likely to lead to workforce opportunities. More than ever before, students attending public universities are diverse, low-income, and the first in their families to attend college. They are price-sensitive and benefit from enhanced programming designed to promote student success.

PSU is well-positioned in this market. Unlike most regions, the Pacific Northwest is expected to see modest increases

in college-ready students for the next 10 years. Institutional strengths are aligned with student expectations, as the campus is the most diverse in the state, relatively affordable and able to offer compelling aid packages, and committed to the success of all students.

The data support the adoption of sensible enrollment targets. This Strategic Enrollment Plan (SEP) proposes a 15% increase in undergraduate enrollment incrementally over the next decade from approximately 17,750 to 20,500 students. Initial growth will coincide with increases in college-bound students, but those increases will taper beginning in 2026. At that point, sustaining growth will require full development, funding, and implementation of the recommendations outlined in this plan as well as ongoing adjustments to the approach that reflect the dynamic enrollment landscape.

Achieving enrollment goals is intertwined with other key institutional activities. This SEP identifies a broad set of factors that are not specific to the work of Enrollment Management, but critical to attaining enrollment goals. These university-wide recommendations include:

- Determine the appropriate role and presence of online education;
- continue to support existing retention efforts as well as fast-track as many recommendations from Students First as possible;
- ensure that PSU remains a reasonably-priced higher education alternative, especially for students considering one of the Oregon community colleges;
- create and promote an 8th advising pathway for new students who are not yet ready to declare a major; and
- pursue national diversity designations to recognize the commitment to access and equity at PSU.

This SEP also provides a comprehensive set of detailed initiatives for implementation by the Office of Enrollment Management. Highlights include:

- Create and implement annual domestic and international student recruitment plans;
- broaden Enrollment Management and university efforts towards diverse populations;
- focus energy on Honors expansion and recruitment.
- invest in regional recruiters;
- simplify the application process to PSU;
- increase and improve student inquiry communications;
- increase the number of virtual recruitment events available to students;
- focus recruitment efforts, and remission dollars, on existing high school partnerships;
- restructure Four Years Free and Transfers Finish Free;
- assess the effectiveness of out-of-state scholarships on enrollment;
- overhaul international student recruitment;
- where possible, centralize college communication and recruitment efforts;
- fully integrate and fund the Embolden marketing campaign into admission marketing; and
- enhance cooperation with community colleges across multiple areas.

It is worth emphasizing the second university initiative:

increasing student success, retention, and graduation.

Any growth realized through new student enrollment increases will be for naught if Students First is not successful, and multiplied many-fold if it is.

Stabilizing and growing enrollment at PSU will not happen overnight, and it will continue to decline without the implementation of a comprehensive set of clear, achievable goals. The SEP represents the best thinking. Many of the initiatives identified in the plan are already being implemented and returning results. Many others will require significant investments of both financial and intellectual capital. The admission targets outlined here are aggressive, but with strong and immediate university support, are achievable.



HISTORIC ENROLLMENT

PSU experienced relatively consistent growth from its founding in 1946 until 2010, with undergraduate enrollment peaking in 2013. However, since then, PSU has experienced gradual enrollment declines with Fall 2019 overall and undergraduate enrollment hitting 13-10 year lows respectively.

The Great Recession is largely credited with PSU's spike in enrollments from 2008-2012, but the fact that enrollment as consistently rising for the years before suggests that the enrollment declines over the last 10 years must be attributed to more than just the improving economy. One theory is that Oregon Promise, a last-dollar financial aid grant program that covers tuition at most Oregon community colleges for lower- and middle-income Oregonians drove students to two-year schools. This made PSU enrollment vulnerable because our student population is made up of over 60% transfer students, and three different community colleges show up as primary competitors for students enrolling in college straight from high school. Another possibility is that increased competition from state flagship institutions (University of Oregon, Oregon State University, and the University of Washington) is a culprit. The explanation could also be as simple as students are no longer drawn to an urban setting, or that the national rhetoric on the real and perceived value of higher education has convinced fewer students to pursue higher education en masse.

While the high-level numbers are important to know and understand, it's important to understand the underlying sub-group enrollments within the overall numbers.

- While the overall enrollment decline at PSU in the last decade was 12.7%, the decline in undergraduate enrollment has only been 7.8%.
- First-year enrollment numbers remained largely unchanged over the last 10 years (there were 121 more first-year students enrolled in Fall 2019 than in Fall 2010), peaking in the year that Four Years Free was introduced.
- Incoming transfer student numbers are down by 247 students since 2010, and peaked when Transfers Finish Free was introduced in 2018.
- Diversity initiatives have been very successful; the percent of diverse students (defined as non-white) increased from 34% in 2010 to 50% in 2019.
- The undergraduate student resident/non resident mix reached its highest point in the middle of the decade, buoyed by a significant increase in international students, and is currently only one percentage point different than it was in 2010.
- In the last 10 years undergraduate enrollment is down 7.8% but graduate enrollment is down 28.4%. Some of that decrease is a result of policy decisions about graduate programs that affected these counts, including a significant decline in the Continuing Education program in the College of Education. There are separate efforts underway to increase graduate student enrollments.
- There is a significant decrease in the number of overall undergraduate post baccalaureate enrollment (down almost 50%), and the number of undeclared first-year students (down 57.7%). Part of the undeclared decrease can be traced to a policy decision to not allow students to be undeclared (they are now required to have a major within a year of enrolling).

ANALYSIS

The task force's starting point was to develop an inventory of where PSU stood as an institution. It did not make sense to recommend recruitment strategies that did not mesh well with the PSU culture, and there was a desire to take advantage of PSU's strengths as seen across the campus. A Strengths/Weaknesses/Opportunities/Threats (SWOT) analysis provided that background. Both the SEP Task Force and the Academic Leadership Team (ALT) in Academic Affairs contributed to the process.

The identified threats fall largely into three categories:

- 1. Competition:** from both the larger, more prominent, state public universities as well as from community colleges and online programs.
- 2. Funding:** from reliance on state funding and tuition to the lack of budgetary support across campus when compared to peers and aspirational competitors.
- 3. National Demographic Trends:** fewer high graduates, more frequent rhetoric about the lack of value of higher education. However, looking ahead to a post COVID-19 world, the threats PSU will face are likely to be less impactful on its student population than what competitors might experience.



HIGH SCHOOL GRADUATE DEMOGRAPHICS

There is little disagreement among enrollment management professionals nationally that the country will face significant declines in both high school graduates and the number of high school graduates who will attend college. With the exception of Texas and the sparsely populated states in the Rocky Mountain Region, the data paint a bleak picture.

However, there are very few colleges that enroll students from the entire breadth of the country; most colleges have a regional (like PSU) or even a local draw. Therefore, to more accurately project the market for college-going students in PSU's recruitment pool, it's more relevant to look at regional and state-wide trends. One sign of positivity is that the population center of Portland is one of the few cities nationally that project enrollment increases.

Of course, PSU draws students from more than just the city of Portland, and with the rest of the data not painting an optimistic demand landscape, PSU must learn from the data and adapt. Many of PSU's peers in urban settings across the U.S. have bucked these population trends and realized enrollment increases over the last few years. PSU's inability to do so in that same period is a message that it does not have to accept population declines as a harbinger for enrollment declines. Nor can it assume that the projection for Portland population growth will automatically lead to PSU enrollment growth. PSU also must ensure that it monitors the college readiness indicators of Oregon's secondary schools, such as was researched by Breslow, Bousset, and Chadwick (2016). If secondary schools are not preparing students to pursue baccalaureate degrees, PSU could see even fewer students ready for, or willing to attend, college.

STUDENT DEMAND

National/Domestic Trends

Not unlike any business or corporation, PSU must continue to offer the degree programs into which students want to enroll. A quick online search reveals hundreds of websites that offer lists of the most popular majors, the most lucrative majors, most competitive majors, and many, many others. Most point to careers in information science, engineering, business, and health care. However, colleges and universities need time and resources to add or pivot to new degree programs.

For example, *U.S. News & World Report* identified its Majors With Great Job Prospects: Mechatronics Engineering, Business, Computer Science, Data Science, Cognitive Science, Nursing,

Pharmaceutical Science, and Human Resources. CNBC lists the Most In-Demand Jobs for 2019: Application Software Developer, Medical Services Manager, Registered Nurse, Medical Technologist, Construction Laborer, Nursing Assistant, and Home Health Aid. The National Student Clearinghouse publishes the fastest growing majors at four-year colleges: Science Technologies/Technicians (+6.4%), Transportation and Materials Moving (+6.2%), Construction Trades (+5.7%), Computer and Information Sciences and Support Services (+5.4%), and Architecture and Related Services (+4.5%). The Bureau of Labor Statistics (BLS) also has data on fastest growing occupations, the occupations with the most new jobs, and data on the highest paying occupations. Health and technology dominate all of these sites.

International Trends

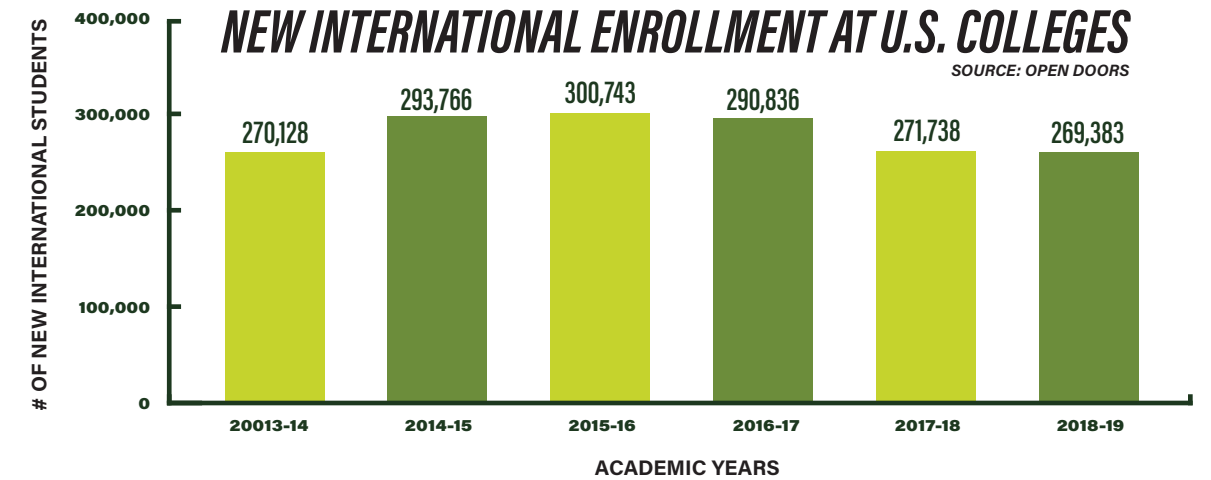
The decline in international student enrollment at colleges and universities throughout the country has been widely reported and is likely to be exacerbated by the COVID-19 pandemic. PSU's decline has been more significant than what others have seen nationally. As of the academic year 2018-2019, the number of international students enrolled at U.S. colleges and universities has decreased across all academic levels (Figure 1) — undergraduate, graduate, and non-degree — according to the Institute for International Education's Open Doors report (2019). Portland State University has been no stranger to this trend as it has seen its share of undergraduate, graduate, and English as a Second Language (ESL) enrollment declines since 2015. Although there are a panoply of reasons for the decline in demand for U.S. degree programming from international students, it is clear that the market to recruit and enroll international students will be characterized by greater competition in years to come.

EXISTING PROGRAMS AND CAPACITY

Another way to determine student demand is to look at the trends for enrollment within Portland State over time to see where student interest has been strongest.

In a period in which overall enrollment at PSU has declined, indications of potential demand for programs can be seen in departments which continue to attract large numbers of students and in areas that are seeing some growth. Each of PSU's colleges with a primary mission of undergraduate education offers programs that have strong demand potential as measured by a combination of these factors.

Figure 1 - New International Enrollment at U.S. Colleges



EXISTING AND POTENTIAL CAPACITY

Large Degrees

The degree with the largest number of students as measured by number of majors is one important indicator of student interest. Table 1 shows the programs within each college that had 300 or more majors in Fall 2019, sorted by highest number of majors in that school. In most cases, demand for these programs in the past has been relatively stable.

In the College of Liberal Arts and Sciences (CLAS), one of the largest degrees is the set of Interdisciplinary degrees in Social Science, Arts and Letters, Science, and Liberal Studies, with

Table 1 - PSU Programs with 300 or more Majors in Fall 2019

COLLEGE OF LIBERAL ARTS & SCIENCES

- Psychology
- Interdisciplinary Liberal Arts and Sciences
- Biology
- English
- Communications
- Environmental Science and Management

COLLEGE OF THE ARTS

- Graphic Design
- Film

MASEEH COLLEGE OF ENGINEERING & COMPUTER SCIENCE

- Computer Science
- Mechanical Engineering
- Civil Engineering
- Electrical Engineering

SCHOOL OF BUSINESS

- Accounting
- Management & Leadership
- Marketing
- Finance
- Supply and Logistics Management

COLLEGE OF URBAN & PUBLIC AFFAIRS

- Criminology and Criminal Justice
- Political Science

SCHOOL OF SOCIAL WORK

- Social Work

SCHOOL OF PUBLIC HEALTH

- Public Health Education

Social Science being the largest. These degrees cut across departments and are often seen as attractive options for degree completion.

While not a major, the University Honors College has a large number of students (over 700) and is growing. Some minimal marketing has occurred for Fall 2020 recruitment, and the preliminary results are encouraging. Marketing the PSU Honors Program should continue to remain a top priority for the University.

Another measure of program capacity is enrollments in courses for non-majors. For example, while Math enrolls fewer majors than other departments, its enrollments are high due to the number of math courses that students take in order to meet requirements in other degree programs. As part of assessing capacity for growth, it is important to look at key courses that enable students to major in other degrees and programs.

Growing Programs

In the context of PSU's overall enrollment trends, even a small degree of growth in majors or degrees awarded indicates a potential for future enrollment growth. The degrees listed below have shown some indicators of growth over the last five or 10 years. In some cases these degrees are also some of PSU's larger degrees.

Measuring current enrollment is a good method to determine what the current demand is for academic programs by PSU's students, but it is not a perfect tool because the demand for these programs has often already taxed the departments' faculty resources. There is likely not a lot of existing capacity to take on more students in these already-popular majors. As PSU develops new programs it will be important to put its limited resources into programs for which there is demand. Currently, when a department, college, or school introduces an idea for a new offering, the market research burden falls onto the academic unit, a task that often falls outside of the expertise of those offices.

Enrollment Management is prepared to be actively involved in those discussions from the outset and help develop strong proposals that meet the needs of the department as well as the overall enrollment goals. PSU should continue to refine the focus of programs on where there can be a distinctive value to students that draws on the unique strengths of its faculty and students. PSU has areas of strength and focus even on what on the surface seem like standard degrees that can distinguish these programs and can help students reach their higher education goals.

Peer Comparisons

It is important to set realistic expectations for both past and future enrollments at PSU. While overall enrollments at PSU have dropped 12.7% over the last ten years, it is not far removed from the unprecedented enrollment increases seen during the Great Recession from 2007 - 2010. In periods of economic uncertainty, access-driven and (relatively) inexpensive schools like PSU tend to have enrollment spikes. However those gains were completely wiped out over the last 10 years, and enrollments at PSU sit at a level lower in 2019 than when the Great Recession began in 2008 and are far from the peak enrollment in 2011.

The task force sought to not only set realistic targets for future undergraduate growth, but also to determine if the enrollment declines of the last decade were experienced at other, similarly-situated universities. To determine the list of comparator schools, the task force started with large, four-year, public universities located in a large, urban center as minimal criteria. Next, they narrowed down the list to schools the most like PSU by considering the admit rate for incoming first-year students and the percent of enrolled Pell Grant recipients. Their final list included the following institutions:

- California State University-Long Beach
- California State University-Sacramento
- Georgia State University
- Indiana University - Purdue University of Indianapolis
- North Carolina A & T State University
- San Francisco State University
- The University of Texas at Arlington
- The University of Texas at El Paso
- The University of Texas at San Antonio
- University of Massachusetts - Boston
- University of Illinois at Chicago
- University of North Carolina at Charlotte
- University of Wisconsin-Milwaukee

Table 2 - PSU Programs that Have Seen Growth in Majors or Degrees Awarded

COLLEGE OF LIBERAL ARTS & SCIENCES

- Biochemistry
- Creative Writing
- Environmental Science and Management*
- Mathematics
- Native American Studies
- Physics
- Psychology*

COLLEGE OF THE ARTS

- Architecture
- Graphic Design*
- Film*
- Music Education
- Sound Arts and Music Production

MASEEH COLLEGE OF ENGINEERING & COMPUTER SCIENCE

- Civil Engineering
- Computer Engineering
- Computer Science
- Electrical Engineering
- Mechanical Engineering*

SCHOOL OF BUSINESS

- Finance*
- Human Resources Management
- Management and Leadership*
- Marketing*

COLLEGE OF URBAN & PUBLIC AFFAIRS

- Political Science*
- Urban & Public Affairs

SCHOOL OF SOCIAL WORK

- Social Work*

SCHOOL OF PUBLIC HEALTH

- Public Health Education*

*Indicates a major that is listed in Table 1



DIVERSITY AND ACCESS DESIGNATIONS

PSU's diverse student population is one of its strengths, and finding ways to highlight that data, as well as searching for potential additional resources to support its students is critical. As Oregon's most diverse public university, the task force recommends that PSU apply to both the Hispanic Serving Institution and Asian American, and Native American Pacific Islander Serving Institution federal designations so that the University is publicly acknowledged for its commitment to diversity.

Hispanic Service Institution (HSI)

There is currently one private college and a few community colleges in Oregon that are recognized as HSIs, and with some focus on recruitment, PSU has the ability to join this group in the coming years. To become an HSI, PSU would need 25% Latino/a/x enrollment (currently at 14.4%). Latino/a/x student enrollment continues to increase at PSU, and we should take steps to formally apply for this designation. (The Office of Student Financial Aid and Scholarships recently posted two front-line staff positions that require applicants to speak fluent Spanish).

Asian American and Native American Pacific Islander-Serving Institution (AANAPISI)

In 2017, the PSU Asian, Asian-American, and Pacific Islander Student Success Task Force recommended PSU pursue the AANAPISI designation in their final report. Enrollment of AAPI students at PSU is currently 10.2% (Fall 2019 & Winter 2020), making PSU eligible to apply for this designation as 10% is required. PSU should apply for this status in January/February 2021. If awarded, PSU would be the first university in Oregon to receive this recognition.

Veteran Friendly Campus

One of the primary reasons for Portland State University's founding was a commitment to military veterans (Dodds, 2000). PSU still enrolls a significant number of veterans, including those studying on their G.I. Bill benefits, but has not achieved any significant recognition for its commitment to this important group of students. Seeking designations such as a Veteran Friendly College or being mentioned in the *U.S. News & World Report* Best College for Veterans list would bring positive attention to PSU's recruitment efforts. PSU should also pursue the American Council on Education's guidance for Evaluation of Educational Experiences in the Armed Services, which could streamline the higher education attainment path for its veteran students.

These designations would highlight and bring visibility to the intentional work that is already being done at PSU to recruit, retain, and graduate diverse students.

COST AND NET TUITION

Across the country almost every college and university sees cost as a top reason for students enrolling or not enrolling. Unlike groceries, household goods, gasoline, and other products that people purchase every day that have a sticker price that everyone pays, the cost of attending college is more than just price; it's a function of price minus discounts. For colleges and universities, discounts are the scholarships (commonly referred to as remissions at PSU) that are offered to students to entice them to enroll. Therefore, in order to compare costs to those at other schools, it is necessary to look at not only tuition, but the amount of scholarship support provided.

Tuition

Portland State's resident tuition (\$8,718 in 2018), while the second lowest of all the four-year public institutions in the state of Oregon, is very close to the median (\$8,376) resident tuition of the large, urban, comparison institutions noted earlier. However, the non resident tuition (\$26,130 in 2018) is the fourth highest, and well above the median (\$21,220) for the same group. But considering that PSU's average state support of \$4,601 per student is the second lowest of all the comparison schools, the rationale behind these tuition amounts is clear.

Remission and Scholarship Support

One of the most important tools in the arsenal of an enrollment manager is the scholarships that are offered to admitted students. Ideally, each dollar in scholarship support is awarded intentionally to meet one or more enrollment targets. Portland State uses merit-based scholarships to attract nonresident

students and need-based scholarships to attract Oregon resident students with financial need so they can afford to enroll. These are common strategies for four-year public universities, and they align with PSU's access mission.

One of the primary sources of scholarship funds for many universities (but not PSU) is from the University's endowment and annual gifts. As a relatively young institution, PSU has a predictably small endowment, and of the schools in the comparison pool, PSU has the fourth lowest endowment per student at \$3,726. As a comparison, in-state competitors have endowments per student of \$24,666 (Oregon State) and \$40,007 (University of Oregon).

The other source of scholarship support at Portland State is its remission budget. In Fiscal Year 2020, this expense was budgeted at \$24M (\$15M awarded by Enrollment Management, the rest awarded by various administrative and academic units), plus another \$17M that is budgeted for the Western Undergraduate Exchange (WUE) program.

PSU has partnered with Ruffalo Noel Levitz (RNL) for the past three years and as a part of that relationship, has access to financial aid awarding strategic advice and also comparison data from other schools with whom RNL works. According to their research (Ruffalo Noel Levitz, 2020), Portland State lags behind other public four-year colleges in both the resident discount rate and average gift aid scholarship. PSU also lags behind other public four-year colleges in offering a nonresident discount rate and average scholarship (Table 3).



Table 3 - Comparison of Remission and Scholarship Data - PSU vs. All Public Four-Year Colleges

	PORTLAND STATE UNIVERSITY	ALL PUBLIC FOUR-YEAR COLLEGES
RESIDENT FIRST-YEAR STUDENTS		
Average Overall Discount Rate (resident students)	12.2%	14.5%
Average Institutional Gift Aid	\$1,777	\$3,044
NON RESIDENT FIRST-YEAR STUDENTS		
Average Overall Discount Rate (resident students)	21.4%	23.8%
Average Institutional Gift Aid	\$6,176	\$7,746

ADMITTED STUDENT PERSPECTIVES

Enrollment Management administered a survey to all admitted students for Fall 2019 whether or not they enrolled. The data gathered in the survey provided insight about attributes of the Portland State experience that shaped equity and inclusion. Results also showed that students feel safe on PSU's urban campus and that they made their decision largely based on the institution's close proximity to their home and the cost of attendance.

For those who were admitted, but never enrolled, many of the same themes emerged in their responses to the survey questions, regarding their initial decision to apply. The city of Portland and the institution's commitment to diversity, equity, and inclusion were both highlighted. Even so, their final college choice was determined based on similar attributes to that of the enrolled student group, yet in reverse. Students identified the proximity of PSU to their home as being too far and the cost too high, in contrast to their final college decision. Nonresident students found the cost especially prohibitive and identified being offered more aid at the institution where they enrolled.

While each thematic area of the survey can be analyzed in greater detail in order to shape targeted efforts, two clear take-aways were apparent across both student groups: cost and location matter. In the context of the questionnaire, students discussed the cost of college attendance in tandem with financial aid and scholarships. The Fall 2019 cohort of admitted and enrolled students was largely an Oregon resident cohort, with about 80% classified as residents for PSU tuition purposes. In the survey, those students emphasized the "[extreme importance]" of PSU's cost in their decision to enroll. As such, resident tuition programs (i.e. Four Years Free and Transfers Finish Free) were identified in open responses as important factors in enrollment decisions. Enrolled nonresident students highlighted the WUE as a determining factor in their college choice.



Conversely, admitted and never enrolled non resident students shared that costs as a non resident were too high and that they were offered too little aid to mitigate the financial burden, even for those who were awarded WUE. In terms of location, whereas the enrolled student population expressed finding value in the close proximity of the campus to their home, the non-enrolled student group often paired the location discussion with negative financial implications, specifically for the nonresident population.

It is imperative that PSU continue to analyze the admitted student survey data annually and adjust future recruitment efforts according to what is learned in the process. There is also value in additional research directed at the population of students who chose a two-year school, and those who picked one of PSU's two primary in-state competitors (the University of Oregon and Oregon State University).

COMPETITION

The list of PSU's top 10 competitors for first-year student enrollment is not surprising. For Oregon residents (Figure 4), all are colleges within the state of Oregon, and half are four-year schools and the other half are community colleges. When looking at all of the first-year student applicants (Figure 5), Washington State and Western Washington both make the list.

Figure 4 - Percent of Oregon Resident First-year Admitted Students Attending Other Institutions

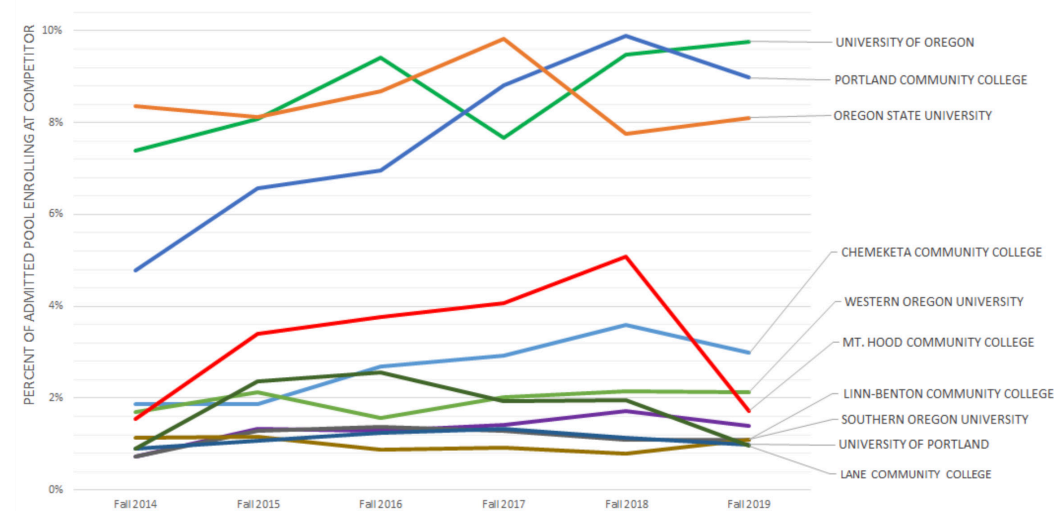
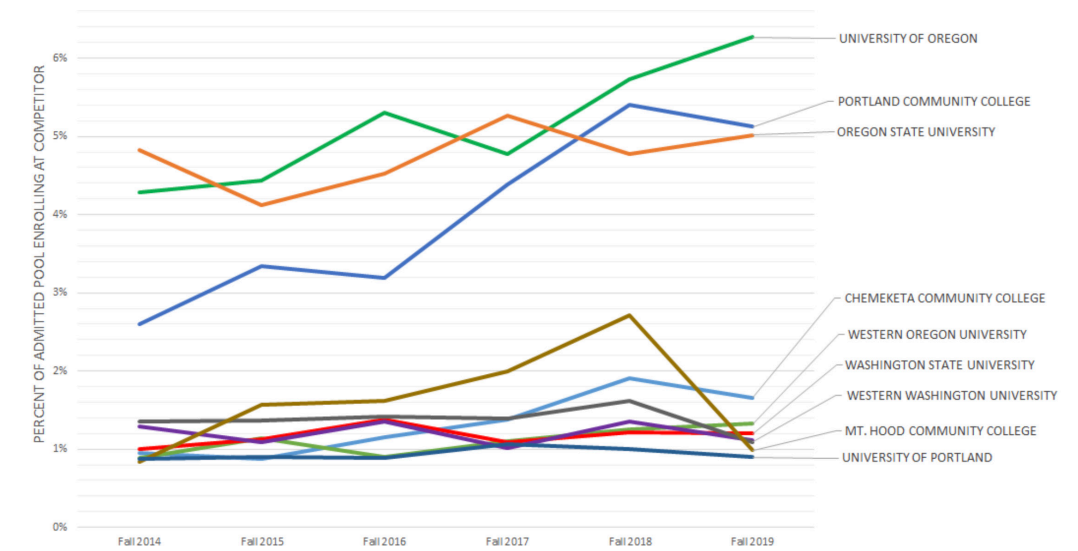


Figure 5 - Percent of All First-year Admitted Students Attending Other Institutions



What is more interesting, and most important for Portland State to understand, is that over the last five years, both the University of Oregon and Portland Community College have significantly increased their share of students who enrolled there instead of at PSU. PSU is fighting a battle for its admitted students on two fronts, highlighted by the recent successes of those two institutions in enrolling students who applied to PSU. Data from the Admitted Student Survey clearly show that most students who apply to PSU choose, or choose not, to enroll at Portland State based on cost, location, and availability of academic programs. Students who choose a community college over PSU are likely doing so because that school is less expensive than PSU. Those who choose the University of Oregon or Oregon State University, are usually paying more to attend those schools. Understanding the rationale for that decision — whether lack of brand recognition, perceived quality of their academic program of choice is higher elsewhere, or something else entirely — is important to study.

CONCLUSIONS

The Task Force carefully reviewed the data included above and made the following conclusions from which this report's recommendations are based.

- PSU does not have to accept decline in enrollment over the last decade is a foregone conclusion. Similar schools have weathered, and even thrived, under the same economic and demographic situations. PSU should take advantage of the benefits its location in downtown Portland offers, both in recruitment, but also as new programs are developed. PSU also needs to focus on its domestic and international non resident students for the diversity and the revenue they bring to campus.
- The biggest threats that PSU faces will be in competition. For its students: (both from Oregon community colleges, and the residential four-year universities). The national demographic trends that indicate a significant drop in high school graduates near the end of this decade and the risk of decreased funding from both the state of Oregon future tuition increases. It's important to note that the national downward trend of high school graduates is not seen in the city of Portland. PSU can take advantage of that bubble of enrollment growth.

- As PSU looks to create new academic programs it should focus on those that have a health care or technology bent to them. Those majors, along with being popular with current college students, have very strong job prospects. Where possible, PSU should also look to expand majors like Environmental Science, Graphic Design, Film, Computer Science, Public Health Administration, and many other majors in the School of Business and in the Maseeh College of Engineering and Computer Science.
- Peer institutions across the country — access-driven, large universities in urban settings that have had undergraduate enrollment success over the last decade — have also had significant success in increasing their graduation and retention rates, and have increased their online degree programs and course offerings. These strategies and successes can be realized at PSU.
- Ensuring that remissions have consistent awarding policies and are awarded so that they have the maximum effect on recruitment goals is critical.

The enrollment goals and projections (Table 4) are considered the minimal targets; ideally, the growth will be more significant than what is listed here, but the task force's research of comparable urban institutions suggests that the target should remain at 15%.



Table 4 - Target New Student and Overall Undergraduate Headcounts

	NEW FIRST-YEAR (FRESHMEN)	NEW TRANSFERS	OVERALL UNDERGRADS
FALL 2020	1,550	2,743	17,776
FALL 2021	1,650	2,773	17,587
FALL 2022	1,750	2,803	17,671
FALL 2023	1,850	2,833	17,921
FALL 2024	1,915	2,863	18,225
FALL 2025	1,980	2,893	18,564
FALL 2026*	2,045	2,923	18,924
FALL 2027*	2,110	2,953	19,299
FALL 2028*	2,175	2,983	19,683
FALL 2029*	2,240	3,013	20,075
FALL 2030*	2,305	3,043	20,472

* In Fall 2026 the number of college-going high school students will begin to decline nationally, although the most significant decline will not be felt in Oregon and the local region until 2029.





RECOMMENDATIONS

The ultimate goal of the Strategic Enrollment Task Force was to recommend a growth strategy for PSU's undergraduate population. Even though the primary source of the last decade's enrollment declines is not undergraduate students, that is the population that has the most potential for growth going forward. The infrastructure at PSU was built up over time to handle the number of students who were enrolled at the peak of the Great Recession. PSU has the breadth of academic offerings, the physical infrastructure, the faculty base, and the location in a thriving, growing, metropolitan area, to handle additional students. PSU's dependence on student tuition for its operating budget, growth is critical to its ability to thrive going forward.

Primary responsibility for enrollment growth going forward will lie with the Vice President for Enrollment Management and the teams in that unit. However, there are some initiatives that will need full buy-in, support, funding, and implementation from across the University.

The following proposals and conclusions put forth by the Strategic Enrollment Plan Task force are grouped into three categories: University-wide Recommendations, Enrollment Management Initiatives, and combined University-wide/ Enrollment Management Collaboration.

UNIVERSITY-WIDE RECOMMENDATIONS

Numerous strategies to help move PSU towards its undergraduate enrollment goals are discussed and explored throughout this report. The following strategies need to be explored, and if possible, implemented, to help PSU meet the aggressive enrollment goals presented earlier:

1. Determine the appropriate role and presence of online education. It is unlikely that PSU will find itself as a significant online education provider nationally (like Arizona State University or Oregon State University). It is still critical to conduct a detailed study of programs that can develop an online presence and also have the student demand to thrive, is critical. Simply increasing the number of programs overall may not have a good return on investment. A careful analysis to determine where there is good potential student demand and departmental capacity would serve PSU well.

Portland State's experience with undergraduate online degrees is limited. Criminology and Criminal Justice Online (CCJO) launched in 2006 with little national competition and a very well-equipped marketing/recruiting OPM partner; the program saw success through 2011 when more schools began offering similar programs. Since 2006, out-of-state enrollments in CCJO went from 60% to the current 27% level, and 1/3 of all CCJO students now live within 20 miles of campus. The lessons for PSU from the CCJO experience is that it's critical to identify the right price point for any future online programs, and that it's important to have targeted marketing efforts focused on the most promising demographic groups very important.

The pandemic and corresponding stay-at-home orders that are currently in place in Portland have not (as of Summer 2020) led to decreases in enrollments. This may suggest that putting more courses and programs online would be a good strategy, but the competitiveness of the online market is real. The task force recommends that PSU identify someone internally to start identifying where online pathways to degrees are needed. It seems that most students want to mix and match online, hybrid, and in-person courses, and PSU can sell itself as a place where it welcomes and supports students in pursuing a flexible mix of course modalities. PSU can give students the tools to determine how much mixing and matching they can do with each degree.

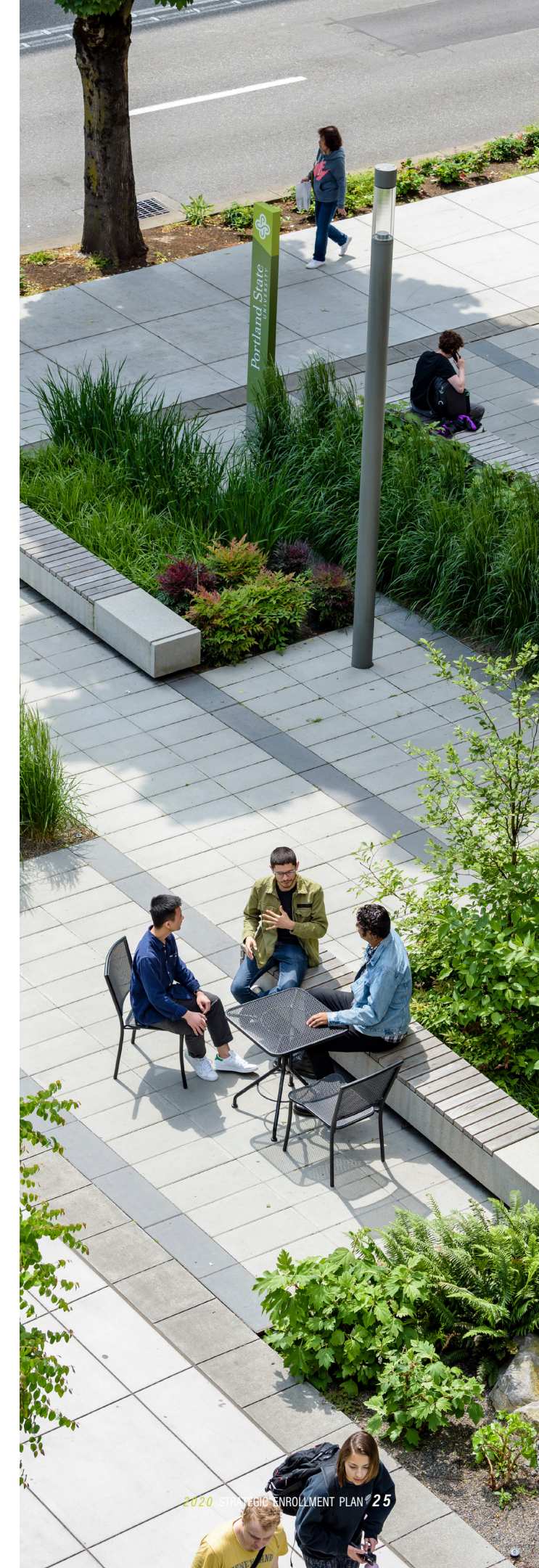
The journey down this path has started, with a study sponsored by the Graduate School and the Office of Academic Innovation, and the results will be key to defining PSU's online presence in the next decade.

2. Continue to support existing retention efforts as well as fast-track as many recommendations from Students First as possible. It's true in enrollment management what they say in business, that keeping a returning customer is more cost effective than recruiting a new one. The strategies currently in place, as well as those being discussed and implemented by the Students First committees, along with the target increases in student retention and graduation are critical components to meeting enrollment goals. An increase in retention is by far the fastest and cheapest route to significant enrollment increases.

3. Ensure that PSU remains a reasonably priced higher education alternative, especially for students considering an Oregon community college. PSU is entering an extremely uncertain financial period in its history, and there will be a strong temptation to use tuition increases and new fees to offset its budgetary challenges. It is important to keep in mind the financial vulnerability of many of its students.

4. Create and promote an eighth advising pathway for new students who are not yet ready to declare a major. PSU should establish an exploratory pathway for students who are not ready to declare a major upon enrolling as a first-year student. This pathway would be helpful in recruiting. The Office of Undergraduate Admissions work with many students who are not sure what they want to study, and may be turned off by PSU's insistence that they identify a major as quickly as possible. In 2013, PSU enrolled 431 new students as undeclared, but by 2019, the number has dwindled to only 193. This was likely not due to fewer students being interested in an undeclared major, but rather a decision at PSU to move students into an advising pathway as soon as possible. Students are required to choose a pathway rather than given the flexibility of selecting undeclared. While well-intentioned and driven by a theory that moving students into an assigned pathway as soon as possible would positively affect student retention and graduation. However, an unforeseen consequence of this strategy was that students who did not know exactly what they wanted to study were often intimidated by the pressure to choose. Putting less insistence on students to declare a major immediately, and providing an advising structure much like what the Oregon State Exploratory Studies program provides, is likely to be received well by PSU's prospective students, many of whom are still very apprehensive about going to college at all, let alone as they are forced to choose a major.

5. Pursue national designations to recognize the commitment to access and equity at PSU. Being recognized as an Hispanic Service Institution (HSI), an Asian American, Native American and Pacific Islander-Serving Institution (AANAPISI), or as a Veteran Friendly campus would highlight and bring visibility to the intentional work that is already underway at PSU to recruit, retain, and graduate diverse students. At present, the Task Force's research indicates that PSU is already eligible for AANAPISI, and is only 3-5 years away from an HSI designation. These designations would qualify PSU for federal grants and additional state funding that will provide an opportunity to increase support services and programs that focus on student success for all students at PSU. Receiving these designations will have a positive impact for the PSU community as a whole, and potentially attract more students to PSU. It will also continue to demonstrate to the Portland metro community and the state of Oregon that it continues to be invested in the access and academic success of diverse students in higher education.



ENROLLMENT MANAGEMENT INITIATIVES

Much of what is proposed below has already begun, though it will take a few years for full implementation to be reached and for measurable results to be realized. Recruitment efforts will adjust to the times (who would have even considered a fully online admitted student reception prior to March 2020?), and Enrollment Management will adjust with it.

1. Create and implement annual domestic and international student recruitment plans. The plan for fall 2021 recruiting is already in place, and much of what it has focused on is contained within this report. For example, a key part of this year's plan (see below) is to establish a physical presence in key recruitment areas like Seattle, northern and southern California, and Texas. Unlike this Enrollment Plan that will stay in place for most of the next decade, recruitment plans must be annual and remain nimble. This report provides the framework; the annual plans provide the detail.

2. Invest in regional recruiters. A common recruiting strategy is to hire admission and recruitment staff to work remotely in regions of the country for which a college either already has a significant presence, or wishes to open up a new territory. As funding permits, Enrollment Management should place a regional recruiter in the currently strong Seattle and southern California regions, as well as one in the rapidly growing Houston market. Due to the high number of international students studying at California two-year colleges, the recruiter located in southern California should also focus on international transfer students.

3. Simplify the application process to PSU. With more than one-third of its students identifying as first-generation, and an average undergraduate student age of 26, the typical student at PSU is not the same as a typical student at traditional four-year universities. The first step to an easier application process began on August 3, 2020 when PSU launched the new admission application and CRM (Slate) that streamlines the application process for students, and greatly improves the ability to communicate with applicants. Another way that PSU can help is to make its admission application available on multi-application platforms like the Common App and the Coalition for College application. These sites allow a student to submit one application and have it sent to multiple colleges.

4. Pilot the use of the Duolingo English Test (DET) as a possible English language proficiency option for international students. The Office of Admissions should expand the range of English proficiency testing options beyond the IELTS, TOEFL, and PTE open to prospective international students by including the DET as an option. The DET can be taken by students for a fraction of what the other tests cost. By piloting for one year, Enrollment Management can evaluate its effectiveness before possibly moving to making it a permanent standard for the establishment of English language proficiency. Establishing a lower cost proficiency test would be in support of the University's access and equity mission.

5. Increase and improve student inquiry communication for both domestic and international students. With a declining number of high school graduates projected across the country, building a database of student names to whom we can deliver email and paper mail recruitment campaigns from Slate will be critical. The Office of Admissions should, where funding allows, increase the number of domestic and international student name leads it purchases, as well as invest in data on high school guidance counselors. They should also work collaboratively with the Portland State Alumni Association to include, and feature, more alums in their recruitment work.

6. Establish new vendor and international (recruiting) agent contracts. International travel is expensive and sometimes difficult on staff's personal lives. The pandemic has added a new concern of personal health and safety to such travel and recruitment efforts. Enrollment Management should continue to develop international agent contracts through International Admissions, and also take advantage of new relationships with StudyPortals (prospect and lead generation) and Uniquet (application conversion); these partnerships can exist even if international travel is impossible.

7. Increase the number of virtual recruitment events available to students. The last few months of virtual instruction and recruitment have introduced a host of options available for recruitment. The last virtual admitted student reception (featuring faculty and alumni discussing career options) had to close after receiving 600 RSVPs. With limited recruitment budgets, and with a large student population that identifies as low-income, virtual recruitment must be explored.

8. Provide marketing and demand analysis for academic departments looking to add new programs. Enrollment Management must be seen as an active partner to colleges and departments who are interested in adding new undergraduate programs. By being involved in those discussions from the outset the proposals may be more focused in areas where new students are looking to study. The administration should provide the resources needed for EM to take on this role to support faculty.

9. Focus recruitment efforts and remission dollars, on existing partnerships. PSU should take advantage of existing programs like the Senior Inquiry High School Program, TRIO, Upward Bound & Educational Talent Search, the Challenge Program, and its excellent relationship with OHSU. These programs were identified as both strengths and opportunities in the SWOT analysis and provide an excellent framework for capitalizing on strong community engagement for additional enrollment.

10. Update remission and scholarship awarding to ensure that the recruitment impact is maximized. Enrollment Management will update current policies on "stacking" (allowing students to qualify for more than one remission) priorities, requiring a scholarship application, the timing of awarding scholarships, and refocus the Honors College and diversity remissions in order to better compete with scholarship awards at liberal arts colleges. Enrollment Management will also initiate a study of the Washington Border Policy so that the eligibility criteria is incentivizing PSU's enrollment and degree completion goals

11. Restructure Four Years Free and Transfers Finish Free. The University's most effective (from a yield perspective) remission and tuition programs for Oregon resident students are Four Years Free (4YF) and Transfers Finish Free (TFF). However, data analysis of these two programs has shown that there are aspects which currently have a negative financial impact on the University. For example, because approximately 40% of resident PSU students are either 4YF or TFF, when tuition is raised, PSU needs to also increase the scholarships by an equal amount for 40% of the student body. PSU ends up with the negative publicity of a tuition increase, without maximizing the additional revenue that comes with it. Enrollment Management, in cooperation with FADM, must explore ways

to retain the recruitment advantages of these programs while improving the financial impact on the University.

12. Develop a better understanding of the effectiveness of nonresident scholarships on enrollment. Enrollment Management should test scholarship awarding models to understand how scholarship amounts influence different groups of students' likelihood to enroll.

13. Re-evaluate the current international recruitment remission model and propose replacement for implementation beginning Fall 2021 term. Enrollment Management will establish a new international remission model that deliberately targets key markets, assists the work of its high-value agent partners, and can impact student enrollment behavior through more targeted, generous awards. The current remission awarding policies for international students have remained largely unchanged over 10 years.

14. Where possible, centralize college communication and recruitment efforts. Historically, Enrollment Management has not been proactive with college-specific recruiters and communications staff to ensure coordinated communication and recruitment activities. It is not uncommon for college-specific recruiters to independently register for a fair, or visit high schools and colleges without attendance by, or notification to, the undergraduate admission office. Deans have been asking for a role in outreach and yield activities, and Enrollment Management should take advantage of this resource. A collaborative, thoughtful approach to university recruitment will lead to a clearer, more enjoyable prospective student experience.

Several tools that Enrollment Management has recently invested in provide functionality that allows for unique academic program messaging, as well as targeting of students interested in peer institutions. Proactive communications with the colleges about EM marketing and recruitment investments should allow deans and college recruiters to decrease their investments in vendor relationships where redundancy exists.

UNIVERSITY/ENROLLMENT MANAGEMENT COLLABORATION

Fully integrate and fund the Embolden marketing campaign into Admission marketing. The Embolden campaign has invigorated the marketing and communications efforts in Enrollment Management (EM). EM must continue to embrace the campaign and needs additional funding after the current contract with 160/90 runs out to maintain the efforts already underway. Embolden provided hundreds of thousands of dollars for social media marketing, billboards, and physical mailers to prospective students. The funding to continue this marketing does not exist in either Enrollment Management or University Communications budgets going forward.

Broaden Enrollment Management and University efforts toward diverse populations. In addition to the aforementioned efforts toward HSI, AANAPISI, and Veteran- Friendly designations, there is more the University can do to show its commitment to its incredibly diverse student body.

Some possible efforts to be included:

- Update the list of Federally recognized tribes on the admission application to accurately reflect the true names of tribes so as to more accurately identify students throughout the admission process.

- Improve exposure of campus resources and support to prospective students and tribal community members who identify as American Indian or Alaska Native.
- Pursue the creation of a remission program that offsets the cost of housing for Native Enrollees and Descendants.
- Dedicate a Financial Aid representative to the assistance of Native students and inquiring tribes.
- Consider a Native and Indigenous Studies First-year Experience / Freshman Inquiry, in cooperation with University Studies.
- Hire more bilingual staff in recruiting and student service positions.
- Contribute financially to collaboration between Enrollment Management and the Native Caucus for events as well as travel to any of the nine federally recognized tribes of Oregon.
- Create a tribal liaison position under the Vice President for Global Diversity and Inclusion.
- Apply for partnership with College Horizons. (Institutions that are already partners include: University of Oregon, University of Portland, Linfield College, Reed College, UC Irvine, and University of Denver).
- Create a stop out survey for (at minimum) students from underrepresented backgrounds.
- Review and implement, where possible, the recruitment recommendations from the 2017 African, African-American, Black Student Success, and the Asian, Asian-American, Pacific Islander Task Force Reports.

Replicate the strong partnership and cooperation between PSU and PCC with other community colleges across the state, and augmenting our physical presence at local communication college. Transfer students have been an



important part of the undergraduate student body at Portland State for many years. The University enjoys a particularly strong partnership with Portland Community College, but its cooperation and articulation agreements can and should expand across the state (and perhaps even into southern Washington). Further, the PSU should explore agreements with local businesses to provide specialized workforce training, or to assist with the degree attainment goals of their employees.

In addition, PSU should augment its physical presence at local community colleges, and ensure that communications at the highest levels of both institutions continue. With the creation of the Transfer and Returning Student Resource Center (TRSRC), PSU has made the resource commitment, and the positions in that office are committed to spending 50% of their time on community college campuses.

Focus energy on Honors expansion and recruitment.

Cost, location, and academic programs dominate the reasons why students choose, or choose not to enroll at PSU. Starting new academic programs is time consuming and expensive, but promoting the Honors College along with a student's chosen major is currently available. It is likely that PSU has the existing capacity to offer Honors to students for whom their other college options are not making the same offer. The personal attention that PSU's Honors students are afforded is good for their retention and graduation, and the prestige of being offered a spot in the Honors College can be used in PSU's recruitment efforts.

Centralize international recruitment and outreach for PSU within Enrollment Management. Establish the current undergraduate international recruitment and outreach team as the global face of PSU centralize of recruitment across short-term, non-degree, Intensive English Language Program (IELP), and all degree programs by leading the various offices across campus with ties to international student recruitment. The offices involved in the direct recruitment of international students most frequently are Undergraduate Admissions (EM), IELP, (OIA/OAA), and the Graduate School (RGS). The Office of International Partnerships (OIP), and the Office of International Student and Scholar Services (ISSS), while not directly serving recruitment purposes for the university, have positions that reinforce, inform, and support PSU's international recruitment and enrollment goals. Establishing both a formal and informal relationships between those offices, with leadership from Enrollment Management, allows for greater synergy and less duplication of effort.





GOING FORWARD

The aforementioned enrollment targets and proposed initiatives to help PSU attain those targets recognize not only what PSU is, but what it can be. This plan acknowledges the enrollment struggles in the past, and makes bold recommendations about how to grow as PSU enters the next decade. There are some significant changes and efforts needed across campus to meet these goals, and the task force believes that there are efforts specific to Enrollment Management that can be implemented with some financial investment in a relatively short period of time.

However, the best laid plans can be affected, sometimes significantly, by external factors; some of which can be planned for and others that cannot. If this plan had been written just six months earlier, the idea of an empty campus would not have even been imagined, yet that's the reality in which the University finds itself as this report is submitted to the President. The short- and long-term effects of the COVID-19 pandemic and the accompanying changes in student behavior are difficult to predict, and campus leadership will need to adjust. Schools like PSU tend to attract more students in periods of economic difficulty, but it's often not enough to offset the state funding reductions that also accompany economic struggles. The number of students graduating from high school and predicted to go to college is predicted to be down by the beginning of the next decade, and there will be significant competition for those students. It's likely that schools not on PSU's top 10 list of competitors now will be there soon; Portland will be an attractive recruiting territory for other schools.

This document lays out a long-term plan towards stability in PSU's undergraduate enrollment. Part of the path to meeting these enrollment targets is laid out here, other strategies will present themselves with time. The Vice President for Enrollment Management is committed to providing to the President and the Board of Trustees, at minimum, annual updates on current and planned initiatives.

