THE RESEARCH AGENDA

Prioritizing Scholarships to Improve Student Access and Grow Campus Diversity

By Jim Brooks and Jen Parker

Influencing student enrollment behavior is an ongoing process. Institutions continually try to predict student college choice while at the same time trying to influence that choice. This article describes the enrollment goals for the incoming freshman class at the University of Oregon, and how a limited institutional financial aid budget was used to address both merit and need-based financial aid.

Concerns around access to a postsecondary education and degree completion continue across the United States (Rouse 2013; Sawhill 2013; Miller 2018). From politicians to educators, the ability for students to earn a degree is an ongoing discussion. Institutions tout their success in remaining accessible to all students, including low-income students, and their peers eagerly reach out to successful institutions for recommendations on how to serve students.

The University of Oregon fully adopted the concept of enrollment management with the hiring of an individual who serves as the vice president for student services and enrollment management. This individual was charged with building an enrollment management unit and implementing enrollment management principles into the recruitment of students to the university. The university previously used institutional financial aid dollars to impact students' decisions around enrollment, but it was not data driven, and decisions were made based on perceptions and feelings around how effective the policy was in accomplishing the goal of shaping a student's enrollment decision.

Research has been conducted around student sensitivity to tuition and the impact of financial aid, whether it be federal, state, or institutionally funded (Seltzer 2017; Tucker 2019; Dickler 2021). It is up to each institution to allocate financial aid and scholarship offers in a way that can effectively target and enroll an increasingly diverse and academically prepared class each year. This article suggests a model for packaging aid and scholarships that is effective for the University of Oregon; however, more can be done to address funding disparities in its schools and colleges as the authors advocate that equalizing educational opportunities should still be a focal point of both higher education policy makers and institutional practitioners (Chen and

DesJardins 2010). Individual institutions may effectively package financial aid offers to target students from a diverse racial/ethnic or socioeconomic background; however, these institutions are reliant on federal and state policies that prioritize affordability programs for all students. Because federal and state dollars are awarded according to regulations instituted by the funding agency, research around the use of individual institutional dollars appears to be more impactful since the institution determines how their funds are used, and how the use of those funds can meet the established goals.

Institutional characteristics impact the way that prospective students respond to financial aid offers from institutions. How a student responds to an offer from one type of institution might be very different from their response to an offer from another type of institution (Hossler 2000). The author also reminds us that it is difficult to separate the impact of tuition on student enrollment from the effects of student aid. Although tuition has an impact on students and parents, the effects of tuition and financial aid do not uniformly affect the decisions of students. Some families equate higher costs with higher quality, while other families exclude institutions based on price. In some cases, the aid offer does matter, and studies have shown that the amount of financial aid can influence an enrollment decision (Chapman and Jackson 1987; Tierney 1980; Spaulding and Olswang 2005; Kim 2012).

Making financial aid information available early in the college consideration process has also shown to be important. Researchers looking at factors influencing college enrollment decisions of Indiana high school students as they move from the ninth grade through high school graduation found that one of the primary factors that parents, and later students, consider when comparing colleges are perceived costs and the probabilities of receiving financial aid. (Hossler, Schmit, Vesper 1998). They found that dropping and adding schools being considered starts as early as the tenth grade but reaches its highest level during the senior year of high school (Hossler and Gallagher 1987).

In order to successfully implement the goals of enrollment management at the university, the effectiveness of all recruitment initiatives had to be considered. This included the use of institutional funds. The university had to move beyond the belief that that since students were enrolling as new freshmen, or continuing their education after their freshman year, that the institutional financial aid dollars were being used effectively.

As the university implemented true enrollment and retention objectives, the use institutional dollars began to receive more scrutiny. Enrollment management was discussed more, especially around the idea of shaping a freshman class. The institution recognized four areas where it should focus its efforts. They were:

- Improve quality of the incoming class as measured by high school grade point average and test scores.
- Increase the diversity of the freshman class as measured by race and ethnicity along with socioeconomic status.
- Increase the size of the freshman class with a goal to grow the overall student population.
- Maintain affordability, especially for students from the state of Oregon.

In order to accomplish these goals, the university realized that it would have to be more strategic in the use of institutional dollars, and would have to rethink its commitment to funding for students. This required more collaboration between the enrollment management units and the academic units. It also meant that university development officers would also need to be a part of the conversation in order to ensure that philanthropic gifts to the university helped support the four areas of focus that had been identified.

Institutional dollars were limited, and there was a decision from the campus administration to increase the commitment to funding students, both with institutional dollars as well as via philanthropy by making financial aid a substantial part of a $2 million capital campaign that was about to be kicked off. The university had always raised funds for scholarship, but it was never a committed goal. And the funds that were raised were not always aligned with the enrollment goals of the institution.

Remembering that growth and affordability were two areas of focus, the university faced determining where affordability lay, that is, what scholarship amount would it take to make the University of Oregon affordable to Oregonians, and what would it take to encourage students from other states to enroll at the University of Oregon.

The university also didn't want to forsake students with financial need. While scholarship dollars also supported economically disadvantaged students, as a large state institution the university wanted to be sure that Oregonians who are financially vulnerable remained a focus, and that the university remained accessible to these students. The university had implemented a need-based aid student support program, but eligibility was not pre-determined, and so each year students had to wait until offers went out to know if they would be eligible. Furthermore, eligibility varied each year depending on which staff members reviewed the applications. This process was not ideal, and so also needed to be addressed as a review of institutional dollars was conducted. Fundraising for the program also was not effective since the program eligibility was not clear; this needed to be resolved as well in order to grow the program.

The Research Model

The Division of Student Services and Enrollment Management (SSEM) took a quantitative approach to reviewing financial aid offerings. Reaching out to research and assessment colleagues for assistance, a regression analysis was run, which was intended to show the impact of financial aid on a student's decision to enroll (Jacobs 2013). Specifically, the analysis looked at:

- What effect does additional merit aid have on the probability of enrollment?
- How do we model the effect of restructured aid on an entering class?
- How can we compare different aid packages dynamically and instantly?

The research team used data available in the student information system for the past to ultimately build a model that could be used to predict the outcomes to changes in the financial aid policy.

The independent variable in the analysis was institutional aid. The population was freshman admits for the fall term since this was the group whose enrollment behavior the university wanted to influence. The first year looked at was the fall of 2011, and each year since the university reviews the fall term of the current school year.

The analysis controlled for the following variables:

- Total grant aid (minus federal and state aid)
- High school grade point average
- SAT or converted ACT
- Admission to the Clark Honors College
- Student residency
- Day the admissions application was submitted
- Whether the student was a first-generation college student
- The student's underrepresented race/ethnicity
- Significant interactions with the university

The model built from the analysis, allowed the university to see the potential effect of restructured aid programs. It would calculate a probability based on the metrics that were input into the model. Keeping the following variables constant enabled the university to change the metric of total grant aid, which would then change the probability of enrollment, thereby projecting the impact of the financial aid change.

- High school grade point average
- SAT or converted ACT
- Admission to the Clark Honors College
- Student residency
- Day the admissions application was submitted
- Whether the student was a first-generation college student
- The student's underrepresented race/ethnicity

University Advancement conducted a benchmarking study to determine and implement best practices for its fundraising strategy within the student success/support division while enhancing its communication practices with campus partners in the enrollment management, undergraduate education and student success divisions. This study became a guiding document for the ongoing fundraising strategy and campaign planning for these divisions and positioned resources and team members within university advancement to focus on cultivating and soliciting broad support for central funds. Monthly campaign tracking over a ten-year period also provided the advancement team and campus leaders with data related to the performance of each division or unit with details about the number of donors to a specific area/program/fund, gift level, gift type, and frequency of giving. These reports demonstrated increased donor interest in central scholarships and student success programs.

Philanthropy

As the university worked to implement a scholarship policy, leaders knew that an increase in funding was going to be a requirement to accomplish all of the goals. The university administration had already committed to increasing institutional funds, but as a public institution, that increase would not be enough to meet the four enrollment goals that had been envisioned. The campus then made a commitment to fundraise around scholarships and need-based aid. The University Advancement team hired a development officer who would spend 50 percent of their time focused on fundraising for financial aid, as compared to the model of fundraising for aid along with other university initiatives. An initial fundraising goal of $70 million was set, and the university exceeded this goal four years into launching the public phase of the campaign.

Along with hiring of an individual, the method of fundraising also had to change. Fundraising just for the sake of bringing in funds, had to become more targeted. Donors had to be discovered, cultivated, solicited, and stewarded with an eye toward reaching campus-wide scholarship fundraising goals. The advancement team created a fundraising strategy for scholarships and student success as part of the then $2 billion campaign and conducted ongoing trainings for development staff to learn how to solicit major gift support for central programs. The programs and campaign "pitch" language and training materials were created in partnership with Enrollment Management, Financial Aid and Scholarships, and the Division for Student Life and Undergraduate Education and Student Success. This fundraising strategy document was then approved by the Office of the President and Provost, which solidified a menu of giving options for the philanthropic community featuring funds that were critically important for the recruitment, retention, and graduation of students. The resulting outreach and cultivation strategy with the institution's external community was data-driven and specific.

Opportunities for giving to a more diverse, academically-prepared and underserved population of students were made available, which aligned with institutional goals for recruiting students each year. This central fundraising team guided donors to match individual philanthropic interests to the institution's pooled scholarship funds whenever possible, allowing for minor preferences or criteria to be selected within the pooled fund parameters. While donors could still create individualized or more restricted scholarship funds within the academic units across campus, the partnership with Enrollment Management and the central Office of Stewardship provided thousands of donors with an avenue to obtain impact reporting, personalized invitations to unique events each year, and consistent communications with fundraising staff on behalf of the central priorities.

The Robin Hood Strategy

The University of Oregon's Advancement and Student Services and Enrollment Management divisions partnered to prioritize central scholarship giving as the foundation for sustainable, equitable support for students. This collaborative approach focused on increasing support for central merit-based, need-based, and general university scholarships to keep talented, high-achieving students in state while making important strides in the recruitment and retention of an increasingly diverse student body. To do this work, the two departments had to create an aligned strategy based on leveraging resources to enhance the student experience for scholarships and other student success retention programs. For recruitment purposes, "Aid leveraging is an analytical tool that enables admissions and financial aid administrators to estimate the amount of financial aid (regardless of formal need formulas) that would be necessary to increase the probability that a student with a specified set of characteristics would enroll" (Hossler 2000).

The scholarship fundraising team marketed central scholarship funds with fewer restrictions as a way for the institution to better recruit and retain talented students. With this strategy, donors were invited to provide a philanthropic investment that focused on a partnership with the student financial aid programs, rather than creating an individual endowment with restrictions and less stewardship. By utilizing the shared data from Enrollment Management, University Advancement could better demonstrate the institution's position in the market and how it measured progress toward its goals each year, to increase the quality of the incoming class, increase the first-year class size, recruit a more diverse student body, and keep costs affordable for residents. By translating the enrollment data to the external constituents and introducing enrollment and financial aid administrators to donors and prospects, the advancement team could better demonstrate impact.

The fundraising team devoted to scholarships and student success priorities communicated the importance of investing in higher education to keep costs down for students overall. This office has helped the institution translate what Hossler (2000) notes as a shift in higher education, where "enrollment management is not only part of an enrollment strategy, it has also become a budgeting strategy" and therefore important to the institution's resource development planning. By leveraging donated dollars with institutional funds as well as state and federal aid, the university utilizes a strategy where philanthropy is celebrated to help the university compete in recruiting students while targeting funding gaps. This partnership has had its benefits. Enrollment Management has a significant part to play in the overall fundraising strategy, and the donors who invest in central scholarships have access to the key administrators and purposeful data to demonstrate impact each year.

For an institution to create a collaborative partnership and align messaging to enhance resource development, it is important to identify shared goals and a common language. By aligning institutional goals, University Advancement exceeded the Enrollment Management goal of $70 million by 178 percent. The institution has successfully attracted more donors and significant support to central scholarships. The university has an eye toward the future, when it may offer more responsive scholarships to support future leaders by decreasing overall debt. Ensuring affordability, access, and success for students is a key presidential priority in achieving excellence at the University of Oregon. In 2018, the university expanded its centralized team focusing on the fundraising for Scholarships and Student Success. During this time, a campaign extension was announced, with an increased goal of $3 billion to be achieved by 2021. With the extended timeline and increased fundraising goal, the Scholarships and Student Success fundraising team requested a benchmarking study to explore:

- Best practices in student success development program structures; and
- Communication flow with campus stakeholders.

Key observations from the "Student Success Feasibility Study" (Procopio and Bell 2019) conducted by the University of Oregon's benchmarking research team revealed the following:

- *Language challenges*: Enrollment management, student affairs and financial aid speak a different language from development. The research team had to take time to learn their language, but even then, an interview did not always happen.
- *Actively partnering with Enrollment Management*: When the enrollment staff or student affairs representative understood what they were being asked to participate in, their hesitance was sometimes because they did not see themselves as relevant or a part of the fundraising process.
- *Strategic use of data to apply interventions*: Creating microgrant programs and understanding stu-

dent segments are both critical to student success initiatives.

- While some institutions have established student success scholarship programs to support low-income students with robust financial aid and wrap-around service support, others have invested in career readiness initiatives to highlight "pathway to career" opportunities. These various approaches share a common goal: to help students better prepare for their economic futures.
- Communicating impact is important and is done by stories and data. None of the institutions share data easily (or at all) between their advancement and enrollment management counterparts.

The benchmarking report helped the University of Oregon better understand how it compared to national, public institution peers with established or growing partnerships between University Advancement and Enrollment Management as well as what areas the university could focus on to strengthen processes. The university believes that true collaboration helps build communal strength. University Advancement should not create the collateral materials, translate institutional data, solicit and steward gifts, train staff, and report impact on central scholarship and student success programs without a shared language and partnership with student services and enrollment management.

The university's benchmarking report (Procopio and Bell 2019) provided tactics to implement and create partnership and communication flow between enrollment management and advancement to strengthen student success initiatives on campus. These included:

- Dedicated centralized development officer(s) to raise funds for student success programs across multiple units.
- Regular communication between development officers and student success program staff to build a strong partnership. This report includes approaches to strengthen communication flow between enrollment management and advancement.
- Predetermined menu of student success funding opportunities for donors to select from. The list should be developed in partnership between development officers and student success program staff. One emerging trend is incorporating micrograms into student success initiatives.
- Inclusion of student success program stakeholders in the stewardship process through thank you letters from program directors and program participants, newsletters describing the impact of gifts, and invitations to program events.

Understandably, study participants with an established point of contact in either department had more success in their overall communication practices between advancement and enrollment management. Forming a partnership between these two areas can yield positive collaboration results for the institution and for students.

The benchmarking study solidified best practice recommendations, forming partnerships by asking:

- How can you avoid duplicating efforts and streamline your institution's storytelling efforts?
- Can you guide your philanthropic community toward supporting institutional priorities by using enrollment or retention data?
- How can you use central scholarships as a vehicle to clarify institutional mission goals and create urgency for donors to support these programs?

Financial Aid Increases

Knowing that cost directly impacts access, and rising costs impact the four areas where the university wanted to focus its attention, and with the results of the research supporting the impact that financial aid would have, the university's acknowledgment that it would have to increase funding encouraged leaders to look seriously at the institutional aid budget.

Early on in the decision-making process, the institutional financial aid budget was not much more than the federal and state grants that students received. Even six years ago, the institutional financial aid budget was still only $2 million more than students were receiving in federal and state financial aid.

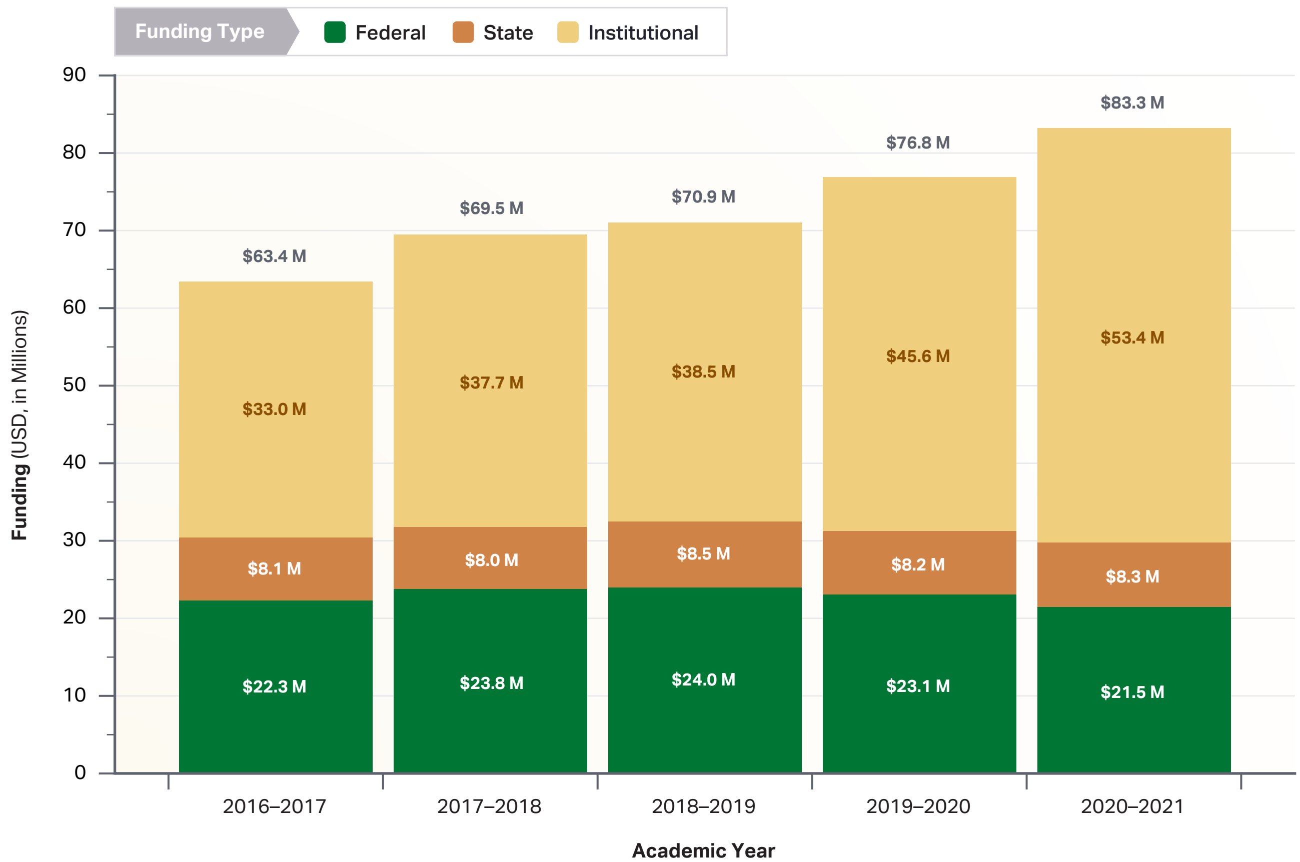

FIGURE 1 ➤ Growth in Institutional Funding, 2016–2021

The university's policy around institutional aid was that 10 percent of undergraduate tuition would be used toward the institutional financial aid budget. While determining the discount rates at public institutions is difficult to do since many institutions don't report this figure, reports by Ruffalo Noel Levitz (2022) indicate that the average discount rate at public institutions is around 15.8 percent. This meant that the university discount rate was almost 6 percentage points lower than its peers. Word of mouth indicates that public school discount rates are closer to 18 percent, but there is no current data to support this. Regardless, even a discount rate that is 5 percent below the average meant that the university was not offering students the levels of financial support necessary to not only enroll them as new students, but to have them remain successful to graduation.

While philanthropy would greatly impact the levels of financial aid that could be offered to students, many philanthropic gifts are not cash gifts, and so they are not available immediately. Therefore, for the institution to increase student funding, it would mean increasing the discount rate.

As Figure 1 shows, this decision was immediately reflected in the growth of institutional funding. During the 2011–12 school year, institutional funding was around $27 million. By the 2016–17 school year, this had increased to $32,982,280, and by the 2020–21 school year, it had increased to $53,400,000. The university has continued to increase its institutional financial aid funding, so that it is more in line with the documented discount rates of its peers. This allowed the university to not only overhaul the scholarship and need-based financial aid offers, but to increase them as the market dictated, allowing the university to remain competitive with its peers as it worked to meet the goals established around enrollment management.

For the 2021–22 academic year, the discount rate was 13.58 percent, a 3.58 percent increase from the university discount rate in 2011. This is still lower than other public four-year institutions, but it is an increase that allows us to be more competitive.

Developing a Fundraising Strategy

Looking ahead, the partnership with University Advancement's Student Support, Foundations Relations, and Government and State Relations teams will continue to help the institution secure external funding to support student aid. These teams will help the institution diversify and broaden current and future funding sources as well as provide budget relief for financial aid. However, these dollars are not always immediately available for spending. While significant support is provided through generous donations each year and the university celebrates ongoing fundraising success, the outright dollars are often pledged over three to five years, or given through a future bequest or "legacy gift" to the institution. It is important to factor in the timeline for realized bequests, annual gifts, and pledged major gift donations when partnering with the fundraising teams in an institution. The student support team at the University of Oregon, for example, provides annual training for gift officer staff and reviews the language for all incoming scholarship funds to the University Foundation, to ensure that the institution agrees to accept gifts that are broad and can be distributed equitably.

Developing a multi-year fundraising plan with the University Advancement team can provide guidance and a better understanding of the institution's needs, especially for the external relations team charged with securing resources that make a measurable impact on the lives of students, faculty, and programs.

The key elements for creating a fundraising strategy include:

- Aligning fundraising goals to the strategic enrollment and financial aid goals; to enhance recruitment, retention, and graduation programs.
- Reporting on how the institution leverages state and federal aid support for scholarships with donated funds.
- Conducting a feasibility study to identify fundraising and student support opportunities based on peer institution models and existing funds within the institution that serve the greater good.
- Partnering with advancement and communications professionals to create collateral that invites donors and foundations to invest in existing student aid and service programs while demonstrating impact of central scholarship programs on campus.
- Establishing a timeline for a fundraising campaign, creating shared collateral, and reporting impact to the external constituents.
- Setting goals that incentivize fundraising professionals to meet ongoing cultivation and solicitation metrics each year and celebrating the success of these campaigns.

Scholarship Changes

The University of Oregon increased automatic scholarships to Oregon residents, raising the maximum scholarship to $4,000 per year, and setting a second-tier scholarship of $2,000 per year. The university increased scholarships to students from outside of Oregon, raising the maximum scholarship $10,000 per year, and setting a second-tier scholarship of $7,500 per year.

The university also set eligibility criteria for the PathwayOregon scholarship, promising to cover full tuition and fees for all students in the program as long as they remained federal Pell Grant eligible. The university didn't set any caps on how much it would cover, so students could be assured that whatever course load they took would be paid for.

The university made scholarship eligibility public, both for merit- and need-based funding, so that students would know what scholarships they would qualify for if they enrolled at the university. This allowed the university to confidently respond to inquiries around financial aid funding, and students could plan their high school course of study knowing what they needed to accomplish to receive funds from the university.

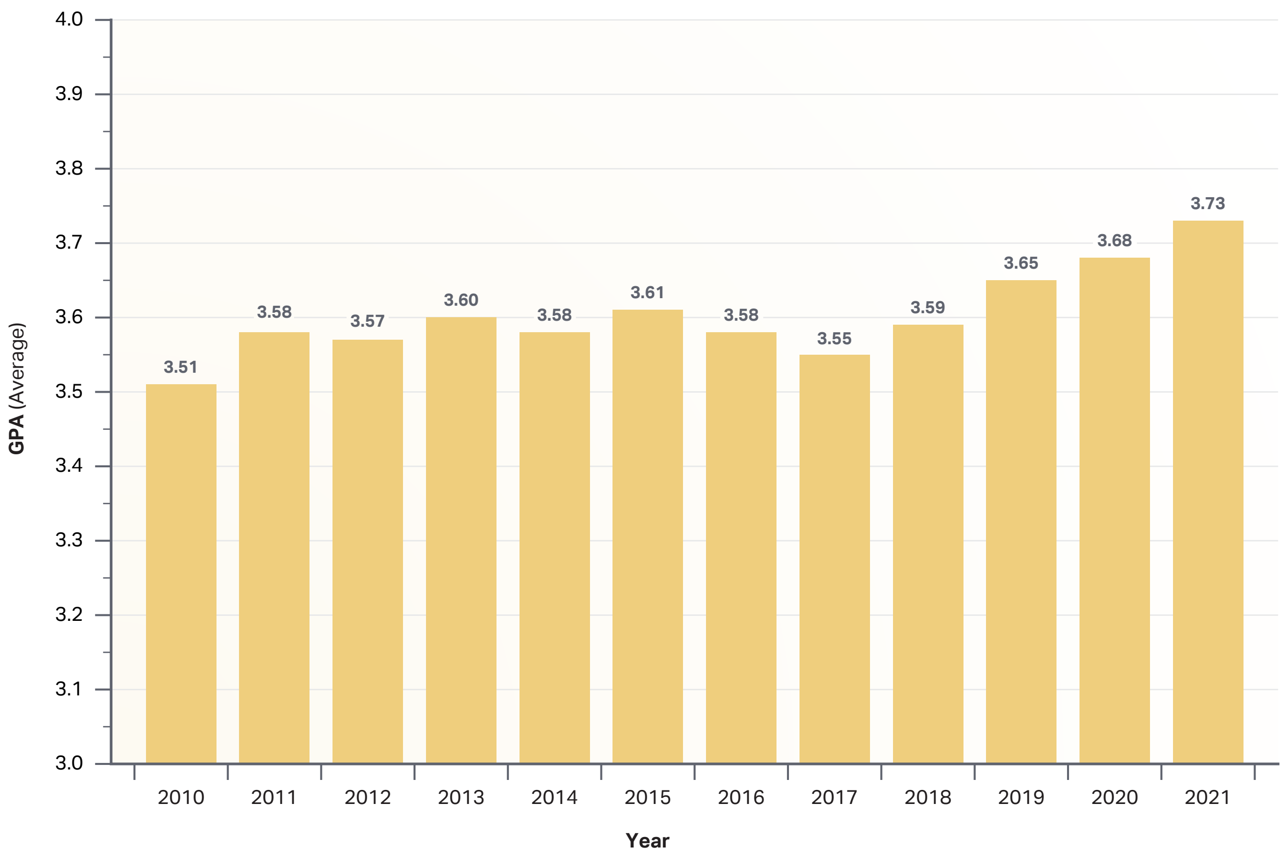

FIGURE 2 ➤ High School GPA of Entering Freshmen, 2010–2021

Results

New Entering Freshman: High School GPA

The University of Oregon saw very positive results from the changes to the financial aid policies. Taking a research-driven approach yielded the results that leaders had hoped for when the process was initiated. Looking back to fall 2000, entering freshmen had an average high school grade point average of 3.40. As shown in Figure 2, freshmen starting at the university for fall 2017 entered with an average grade point average of 3.55 (Thompson, 2021).

Freshmen entering the university starting in fall 2021 entered with a 3.73 grade point average, an appreciable increase over a five-year span, and a considerable over the years previous to the statistical analysis of how the university used institutional aid dollars.

New Entering Freshman: Domestic Minoritized Students

Increasing the diversity of the freshman class, as measured by race and ethnicity, was another goal of restructuring of financial aid programs. This was, and remains, a challenge, as according to the United States Census Bureau (2021), 86.2 percent of Oregonians identify as white. In the fall of 2000, 15 percent of entering freshmen were identified as domestic minority, so the entering class was already slightly ahead of the state population. But the goal was to be able to deliver an educational experience that prepared students for a global economy. This meant that they had to learn in a community that reflected the world.

The changes made to the institutional funding models had an immediate impact on the diversity of our population. As Figure 3 (on page 12) shows, the in-

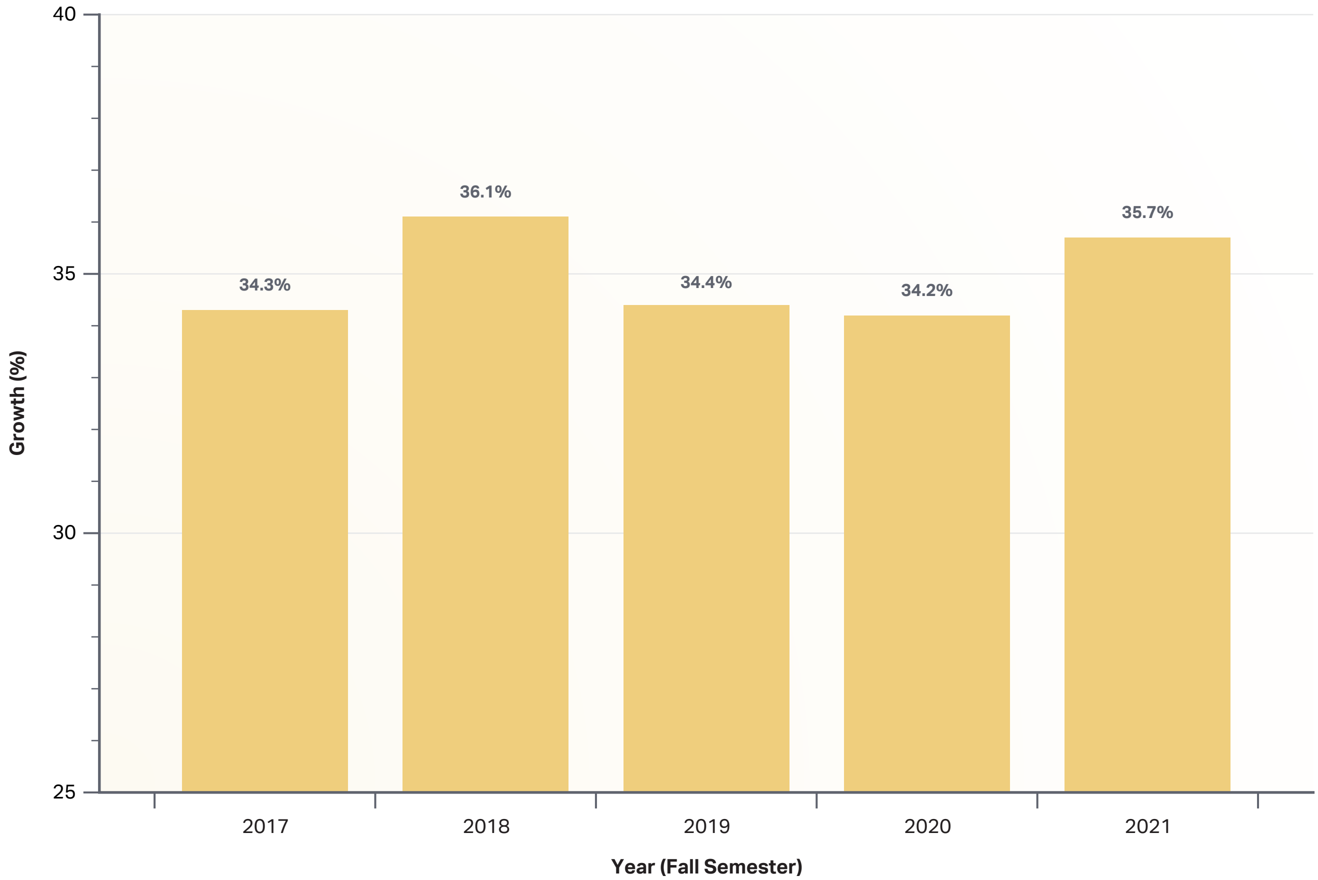

FIGURE 3 ➤ Percentage of Student Body Identifying as Domestic Minorities

stitution saw a considerable growth in the number of students who identified as domestic minorities.

Within seven years of the original statistic, the university more than doubled the number of domestic minorities in the incoming freshman class and continues to work toward goals to welcome and support a more diverse community of students, faculty, and staff each year. While offering more funding to students played a major impact in this success, the university also made a conscious decision to reach out to communities of historically excluded or marginalized people, working toward establishing stronger connections by attending cultural events in the state, promoting ongoing work to advance inclusive excellence on campus during recruitment events, and making it clear that the university is interested in recruiting, retaining, and graduating individuals from these communities.

For example, the university became a major sponsor of the city of Woodburn's Fiesta Mexicana. Woodburn is an Oregon city with a large Latinx community, and the weekend is an event to honor the Latinx community in Woodburn and the metro-Portland area. The university's sponsorship was not only financial; the university was also present throughout the weekend, with students, staff, and the school mascot in the parade as well as participants in other activities over the weekend.

Another example is the university became a major sponsor of Portland's Good in the Hood event. This was a weekend event celebrating the African American community in the city of Portland. Once again, the university's participation was physical as well as financial, with university staff and students on site for the weekend, participating in the events that honored the African American community.

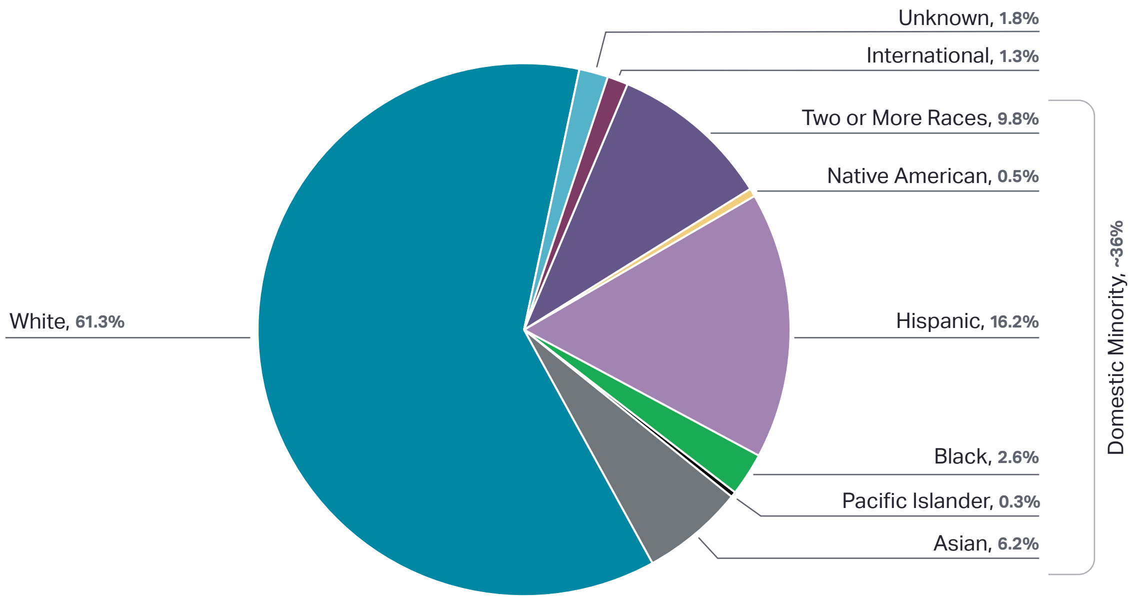

FIGURE 4 ➤ Distribution of Races/Ethnicities

Activities like Fiesta Mexicana and Good in the Hood, in addition to financially supporting students, helped increase the percentage of underrepresented minorities in the freshman class, and the university has seen that percentage increase stand, exceeding 30 percent in the last five incoming freshman classes. The university's presence at these events displayed an interest and commitment to serving these communities, and welcoming students from these communities to campus. Discounting the cost is important, but creating a sense of belonging for students from these communities was a theme of conversations with the communities.

There is still work to do to increase the numbers of specific ethnic groups, for example African Americans. According to the United States Census Bureau (2021), 2.3 percent of Oregon residents identify as African American, and while 3 percent of the university's entering freshmen identify as African American, it continues to work to increase that number. The same is true for Native American students, where the institution is exploring other opportunities to try and increase the number of students on our campus.

New Entering Freshman: Class Size

The university also wanted to increase the size of the incoming freshman cohort of students. For the years 2000 to 2010, the average freshman class size was 3,344, with the freshman class in the fall of 2000 totaling 2,788 students, according to the University of Oregon (2021) SSEM Research and Assessment.

With the restructuring of institutional aid programs, the university saw an increase in the number of incoming freshmen choosing to enroll at the university. The fall term of 2020 was an exception due to the impact of the coronavirus on the university. Course offerings were online as the campus only offered a remote education experience, and so fewer students chose to enroll that fall.

The fall of 2021 saw a record freshman class, meaning that other than the fall impacted by the coronavirus, the university had three classes of freshmen that increased in size each year. (*See* Figure 5, on page 14.)

This growth in freshmen, along with new transfer students, resulted in record new student classes as well. Other than fall 2020, as you can see from Figure 6 (on page 15), transfer enrollment has held pretty steady.

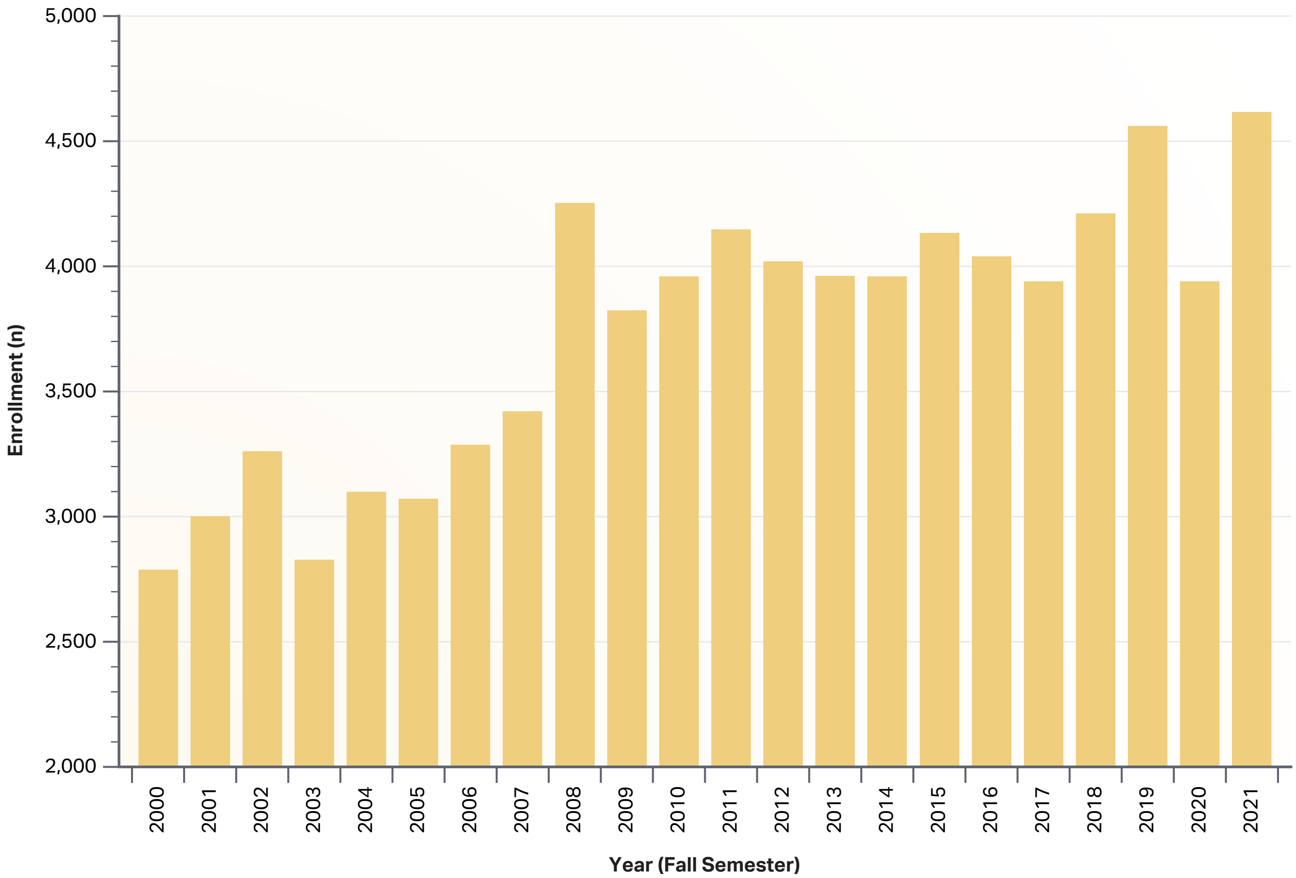

FIGURE 5 ➤ Freshman Enrollment, Fall 2000–Fall 2021

Cost of Education Affordability

As mentioned earlier, the focus on access for lower-income Oregonians is reflected in the PathwayOregon program. Federal Pell Grant eligible students display exceptional financial need, which is the main eligibility criteria for that federal grant program. For students dealing with situational poverty, the federal Pell Grant is again a good indicator of the impact of their circumstance since financial aid administrators can take those situations into account when determining federal Pell Grant eligibility.[1] The intent in growing the PathwayOregon program was to ensure that the university remained affordable to economically disadvantaged Oregonians, even as it grew merit-based aid programs.

As Figure 7 (on page 16) shows, the university saw a positive impact to the restructuring of this support program. It saw annual growth in the program as it was transparent with regard to eligibility criteria, and it better financially supported the program.

After reaching a peak enrollment in fall 2018, the university saw some changes in eligibility the next year as it adjusted funding for the program in response to other institutional initiatives. The impact of the coronavirus resulted in lower enrollments for the next two years. Looking back at the freshmen enrollment data in Figure 5 and Figure 6 (on page 15), the university was seeing this same behavior in 2020 and 2021 with other

[1] For more information on Pell Grants and determining eligibility, *see* the Federal Pell Grants section of the Federal Student Aid site at <studentaid.gov/understand-aid/types/grants/pell> and the Special Cases page in the *Federal Student Aid Handbook* at <fsapartners.ed.gov/knowledge-center/fsa-handbook/2022-2023/application-and-verification-guide/ch5-special-cases>.

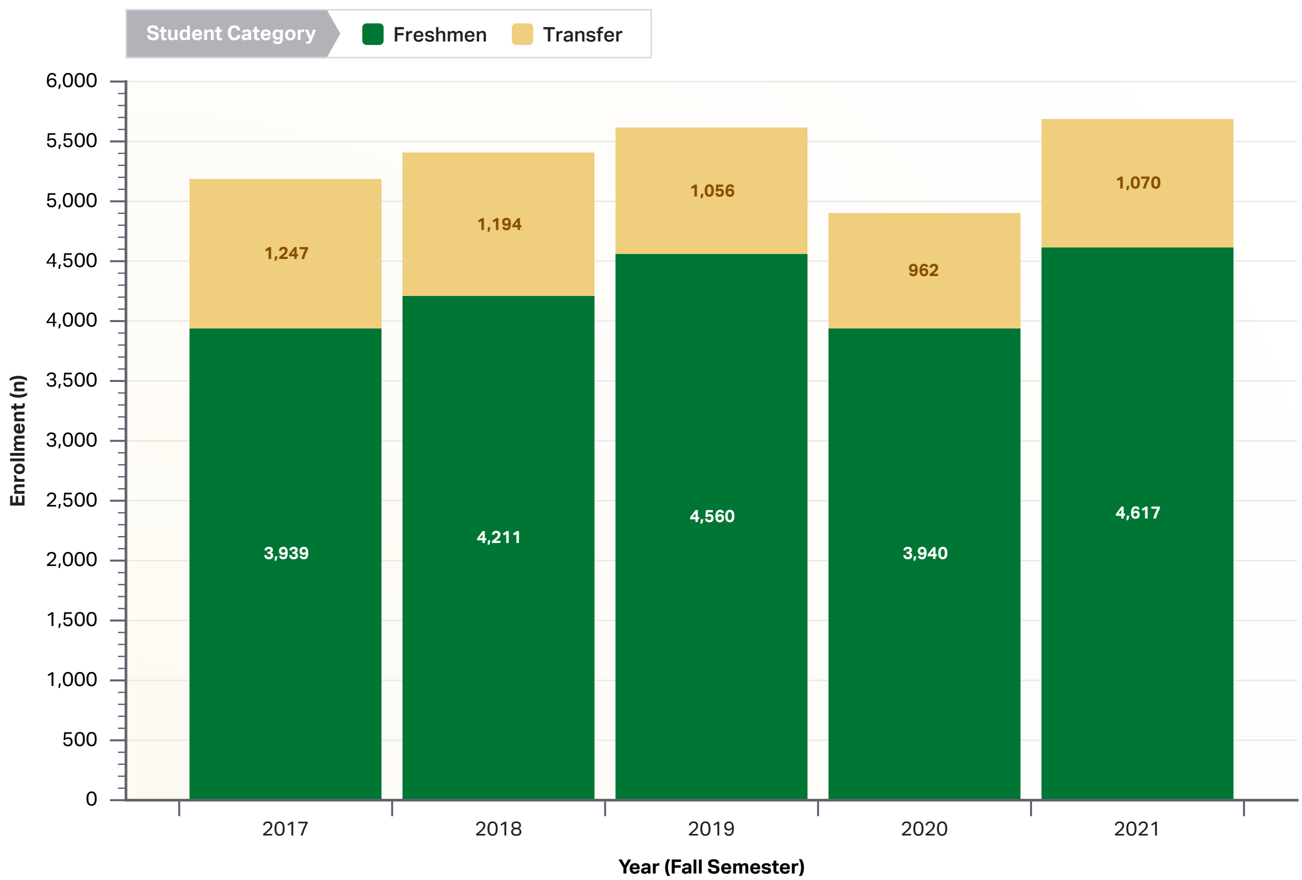

FIGURE 6 ➤ Incoming Students, by New Student Category

student populations due to the effect of the coronavirus on enrollments.

The University of Oregon continued with efforts to grow endowments for this program. As Figure 8 (on page 17) shows, initially the endowments were very low, and they remained that way until the university made a concerted effort to fundraise for the Pathway-Oregon program. In 2015, efforts began to result in positive growth for the endowment, culminating with the most recent endowment level in 2021, the highest for this program.

This allows the university to continue efforts to maintain access to the university for economically disadvantaged Oregonians. The institution continues to fundraise for this program, as well as for merit-based scholarship programs.

Limitations and Areas for Further Research

This review is focused on the work within the University of Oregon campus; however, the authors believe that peer institutions would benefit from a similar structure or design so that centralized funds can be leveraged to support specific groups of students each year. The institution is unfortunately limited in how it reviews its own data. For example, it needs to look at the impact of these funds by race and ethnicity, to better understand and report success through a diversity, inclusion, and equity lens. Additionally, the institution is focused on recruitment strategies using centralized funds, so additional research will also be needed to determine how these collaborative fundraising practices impact students' retention and graduation rates.

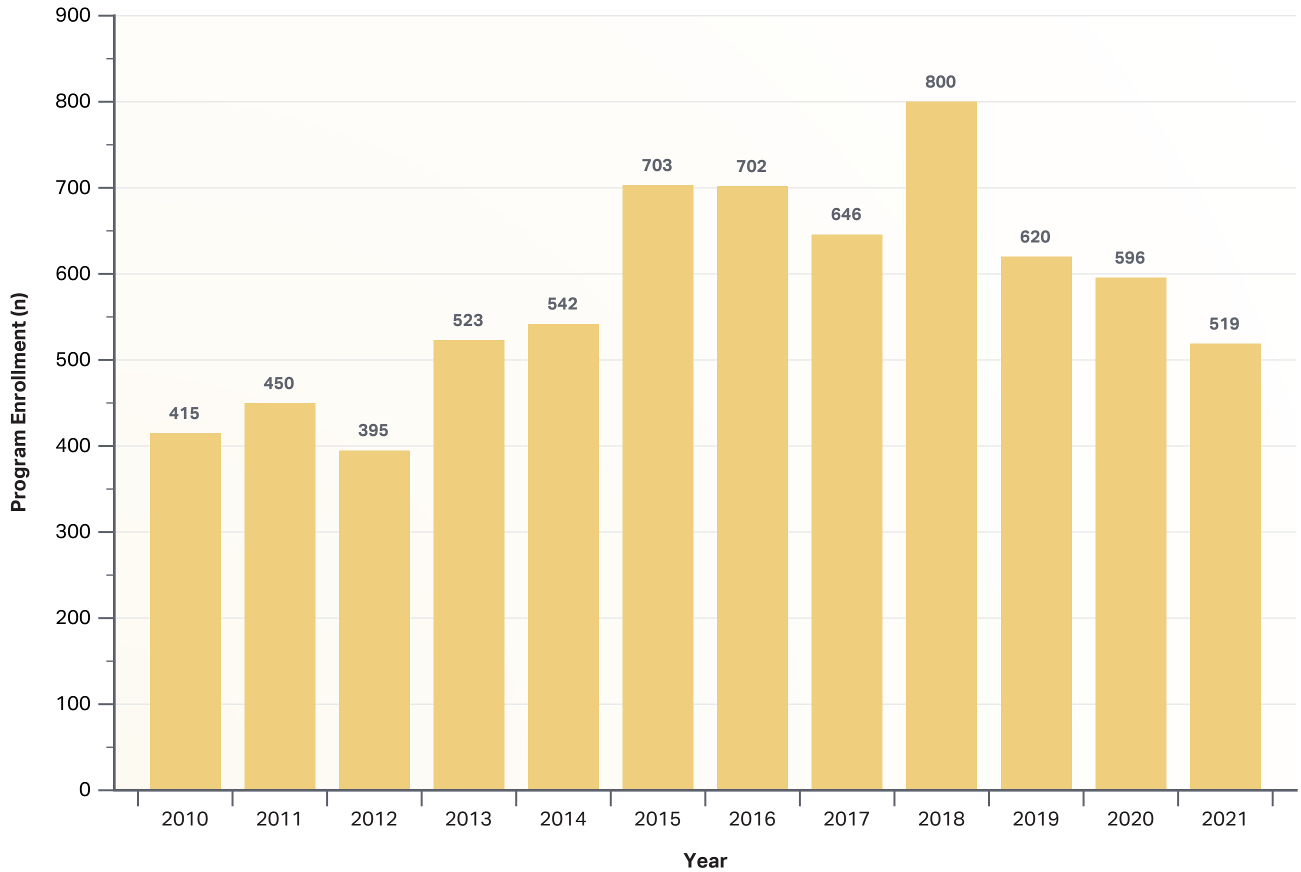

FIGURE 7 ➤ Overall Growth of PathwayOregon Program, 2010–2021

From a financial planning perspective, the University of Oregon offers a guaranteed tuition rate for five years or fifteen terms, to help students and families plan and budget their educational experience and costs. The university does not factor in cost changes with inflation and does not index our scholarship amounts to that cost. For an institution that adjusts tuition each year, it may need to adjust its scholarship offers in order to address these increased costs. The university make assumptions about students' overall financial need, and have not considered the additional resources that students bring in through external scholarship support.

Additional research will need to be conducted, possibly through a multi-institutional benchmarking study, to review how other higher education institutions measure the impact of centralized scholarships and student success programs on student academic outcomes. Likewise, the authors welcome additional research on the overall impact of transformational gifts for students who may or may not be receiving other financial aid, to help create best practices for student impact fundraising across the country. With a shared understanding, vision, and system of measuring results, institutions can develop system-wide processes that help them partner with philanthropists to create multi-generational impact for each institutions' students.

Conclusion

Over the last ten years, the University of Oregon has made significant progress toward meeting it's four enrollment management goals. The university has raised the grade point average of the incoming class to record levels. It has successfully increased diversity— both racial and ethnic—as well as socioeconomic in a state

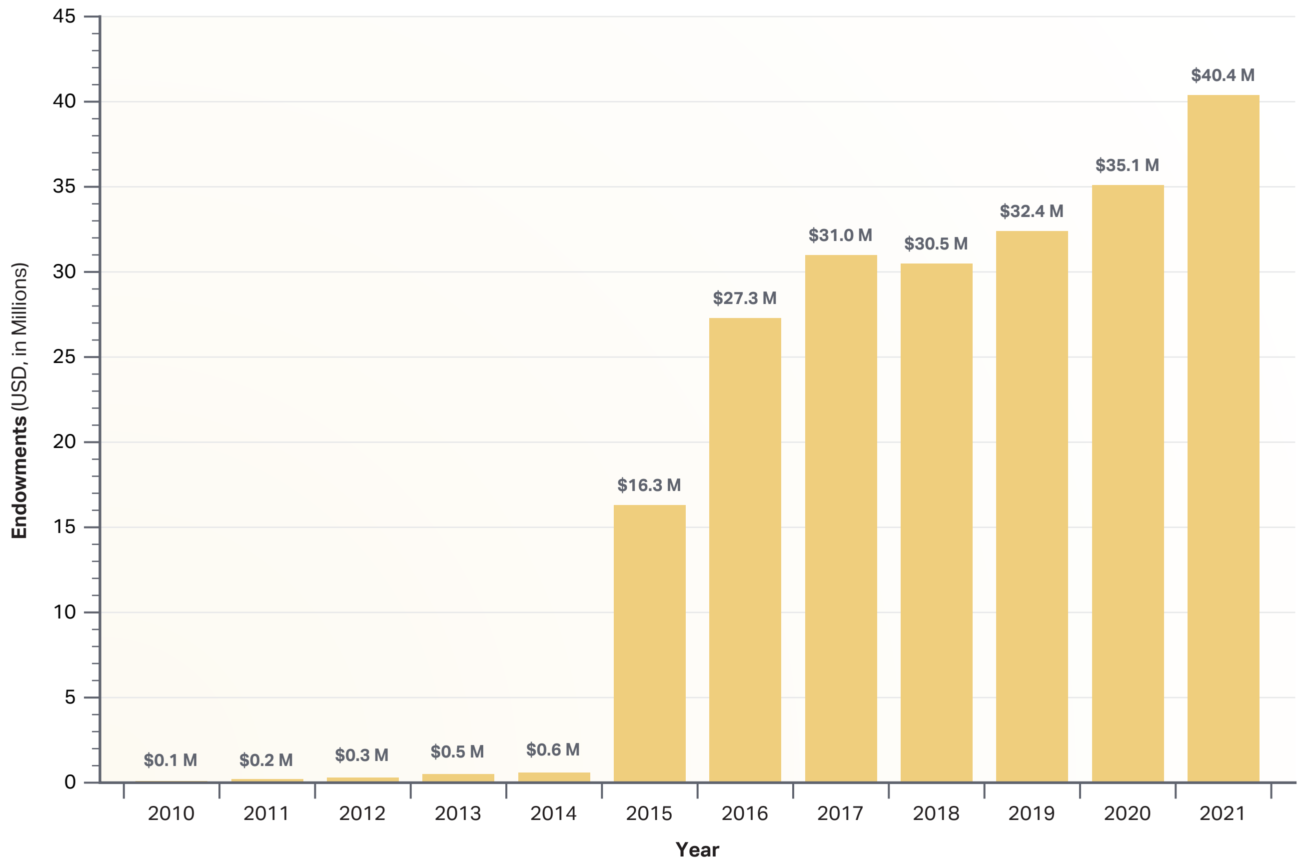

FIGURE 8 ➤ Growth in University Endowments, 2010–2021

where diversity is not increasing. The university has had a record freshmen class two out of the last three years and has raised significant support in order to keep costs affordable for students. Although money is not the only reason that students chose the University of Oregon, the university was able to use student aid to influence student decisions and to accomplish its goals.

This work is not done alone. The Office of Student Financial Aid and Scholarships partners with the Office of the President, Office of the Provost, University Advancement's Government and Community Relations, Foundation and Corporate Relations, Office of Stewardship and Donor Relations and its central Development Office as well as the university's central Marketing and Communications Office, the Alumni Association, Undergraduate Education and Student Success, Student Life, Admissions, and the schools and colleges. Through a collaborative strategic planning and implementation process, the university continues to meet shared goals and align resources where possible to serve students by removing financial barriers to a postsecondary education.

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