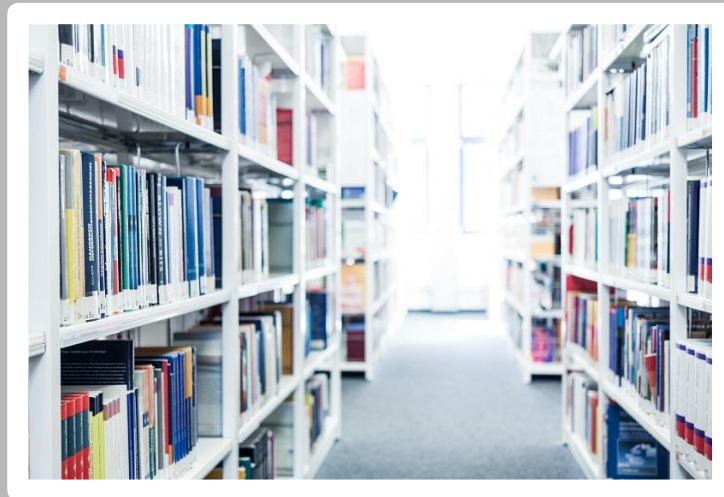


ANNUAL EVALUATION OF THE OREGON
OPPORTUNITY GRANT:
House Bill 2407 (2015)



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PREFACE

The Oregon Opportunity Grant (OOG) is Oregon's largest state-funded, need-based grant program for college students. From its inception in 1971, the program has undergone many changes in how it awards funds, the amount of funds awarded, and who is awarded funds. Most recently, House Bill 2407 (2015) clarified how the Higher Education Coordinating Commission's (HECC) Office of Student Access and Completion (OSAC) should prioritize grant awards for qualified students with the greatest financial need if funds are not sufficient to serve to all qualified students. The bill further stipulates that the HECC prepare and submit an evaluative report of the OOG to the Legislature annually that examines the academic success and performance of students who receive the OOG. This is the second report to fulfill these requirements. The report also evaluates whether the Oregon Opportunity Grant reduced equity gaps and addresses program impacts.

This report was undertaken by staff in HECC's Office of Research and Data in coordination with HECC's Office of Student Access and Completion. HECC is the single state entity responsible for ensuring pathways to higher educational success for Oregonians statewide. The HECC sets state policy and funding strategies, administers numerous programs and over \$1.4 billion annually of public funding, and convenes partners working across the public and private higher education arena to achieve state goals. More information about HECC can be found at www.oregon.gov/highered and about the student financial support programs it administers at www.oregonstudentaid.gov. Questions about the HECC should be directed to info.HECC@state.or.us, and questions about this report should be directed to the Director of the Office of Research and Data, Amy Cox, at amy.cox@state.or.us.

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EXECUTIVE SUMMARY

INTRODUCTION

The Oregon Opportunity Grant (OOG) is Oregon's largest state-funded, need-based grant program for college students. It is available to eligible students attending Oregon colleges and universities for up to four years at full-time enrollment. In 2019-20, the annual grant awarded \$3,300 for students attending a public university or Oregon-based independent private non-profit institution and \$2,700 for students attending a community college.

In 2015, House Bill (HB) 2407 established prioritization of grant awards to students with the greatest financial need if funds are not sufficient to serve to all qualified students. The bill also required the HECC submit an annual evaluative report of the OOG to the Legislature beginning in 2020. This is the second annual report, presenting findings on the impact of the OOG on student academic success and performance from academic years 2015-16 to 2019-20, with an emphasis on the most recent year.

The first annual evaluation of the OOG examined the impact of the 2015 policy change on undergraduate students with the highest financial need. The report described that this policy change shifted OOG awards and funds away from the highest-income to the lowest-income recipients. Total dollars distributed to students with an adjusted gross income under \$20,000 rose from \$33.5 million in 2015-16 to \$40.6 million the following year. However, the great majority of students with financial need did not receive an OOG award due to lack of available funds. The 2015 policy change had no impact on the representation of race and ethnicity, gender, age, or the first-generation status among OOG recipients. In addition, the authors found that the policy change positively affected the academic success of undergraduate students who received the OOG award, including those students with the highest financial need. Retention rates for OOG recipients were equal to or better than those of non-recipients statewide, and OOG recipients had similar or better completion outcomes at community colleges and public universities.

This second report asks the following questions:

1. Who receives the OOG?
2. How effective is the OOG at reducing equity gaps in affordability?
3. What is the academic success and performance of students who received the OOG?

We draw on five sources of data to answer these questions: student records provided by public universities, community colleges, and private postsecondary institutions; state grant disbursement records, and completed Free Application for Federal Student Aid/Oregon Student Aid Application (ORSAA) records. We compare OOG recipients primarily with another group of students from low-income backgrounds: those whose expected family contributions (EFCs) are above the limit for the OOG but who are still eligible for the federal Pell grant. These two groups are similar in many ways,

though they do have slightly different family incomes. Students eligible for the OOG had EFCs of \$3,500 or lower for the 2019-20 academic year, while students eligible for Pell grants but not eligible for the OOG had EFCs between \$3,501 and \$5,576. Finally, we also include students whose EFCs were above the Pell limit of \$5,576 as another comparison group.

FINDINGS

The OOG provides financial support to more than 30,000 students each year. About half of these students attend one of Oregon's seven public universities, just under half attend one of Oregon's 17 community colleges, and about 4% attend one of 13 private, independent colleges and universities in the state.

Students who receive the OOG include all racial/ethnic, gender, age, and geographic groups. Some are the first in their families to attend college. At the public universities, they are disproportionately older, while at the community colleges and private institutions, they are most often younger. In addition to supporting students from the lowest income families, the program disproportionately serves students in groups that have been and continue to be some of the most marginalized in education: historically underserved racial/ethnic groups, women, rural, and first-generation-college students. Students in each of these groups are disproportionately represented in the OOG.

Students receiving the OOG still face significant affordability challenges, even with the grant. More than three-fourths of OOG recipients at the public universities and half at the community colleges cannot pay the expected cost of their education, even with their grants and scholarships, EFCs, and estimated own earnings. For university students, those receiving the OOG (and Pell grant, for nearly all) are still slightly more likely to face unaffordable costs than those receiving the Pell grant but not the OOG. For community college students, those receiving the OOG are much more likely than other low-income students to face unaffordable costs. These high rates of unaffordability persist across racial/ethnic, gender, age, and rural-urban status.

Though the OOG does not alleviate the affordability challenges of postsecondary education today, it does have an impact. If the OOG were not in place, students would face even higher unaffordable costs, likely filled with loans. In addition, nearly 4,000 additional students would face costs of education that were greater than their grants and scholarships, EFCs, and estimated earnings. Moreover, the impact of the OOG was stronger for some historically underserved groups, including first-generation students in both sectors, Black/African American and Hispanic/Latinx students at the universities and Native American/Alaska Native and Hispanic/Latinx at the colleges, as well as for white students at the colleges.

OOG recipients show strong progress through college and university. Across all three sectors, they show slightly higher retention than other low-income students (those who qualify for the Pell grant but whose EFC is higher than the OOG limit). This finding holds across nearly all student characteristics. Middle and upper income students (those who did not qualify for an OOG or a Pell) show the highest retention rates.

Similarly, OOG recipients are more likely to complete a course of study than other low-income students, across all three educational sectors. Middle/upper income students have the highest graduation and completion rates. This pattern holds across students' race/ethnicity, gender, age, and rural-urban status. The few exceptions come from groups with small numbers where results are more volatile. OOG recipients who complete a bachelor's degree do so faster (by about one-half year) than other low-income students, and those who complete an associate degree do so faster or in about the same amount of time as other low-income students.

In general, students who receive an OOG are those who disproportionately face multiple equity barriers and who continue to face affordability challenges even after receiving the grant. Nevertheless, the findings here show that they succeed in college and university comparably and often better than other low-income students.

CONCLUSIONS

Through the OOG, the State devotes more than \$150 million each biennium in direct support of low-income Oregonians' pursuit of postsecondary education. For nearly all OOG recipients, this investment is amplified by the federal Pell grants that accompany the OOG. The returns on this investment are experienced by individuals, communities, and the State.

The higher graduation rates of OOG recipients compared to similar low-income students is the initial return on this investment. It is consistent with research that finds grant aid increases a student's probability of completing their degree program.¹ Further, the comparable or higher graduation rates of OOG recipients open the door for the lifelong benefits of postsecondary education for individuals and families. These benefits include not only higher earnings and lower unemployment but also greater health and life expectancy.²

Access to higher education also changes the outlook for future generations, as postsecondary education is a key driver of upward mobility. OOG recipients are three times as likely to be first-generation college students as those who do not receive an OOG. The upward mobility afforded by attending an Oregon college or university brings economic stability for families, which in turn stabilizes communities and yields higher tax revenue for the State. This work of converting families' financial instability into reliable economics is also essential for the State's economic recovery from the COVID-19 recession. The lowest income communities that have borne the brunt of the economic crisis cannot move into lasting stability without access to the higher-paying jobs that postsecondary credentials provide.

¹ Reference: Nguyen, T. D., Kramer, J. W., & Evans, B. J. (2019). The Effects of Grant Aid on Student Persistence and Degree Attainment: A Systematic Review and Meta-Analysis of the Causal Evidence. *Review of Educational Research*, 89(6), 831-874.

² The College Board, Education Pays 2016. <https://trends.collegeboard.org/sites/default/files/education-pays-2016-full-report.pdf>

While the OOG does not single-handedly open the door to postsecondary education and the benefits it provides, it combines with other sources of student aid to make postsecondary education possible for many students. Further, it insulates the lowest-income students from tuition increases and limits the amount of student debt with which they will be burdened.

The success of OOG recipients in school, combined with the fact that the program disproportionately serves students who face multiple barriers to an equitable postsecondary education, indicates that the main limitation of the OOG is insufficient resources to serve more students. The continued affordability challenges faced by low-income students point to substantial additional need for the OOG. If Oregon is going to meet its educational goals and enjoy the economic and social stability that accompany them, expanded state-based financial aid seems not only warranted but required.

ACKNOWLEDGEMENTS

This report would not have been possible without the contributions of many people. In particular, we wish to thank the many staff in the HECC Office of Student Access and Completion who work with students and schools to administer the Oregon Opportunity Grant. Similarly, our institutional partners' ongoing work with students who apply for and who receive the grant is an essential part of the grant's success. Finally, we want to thank the students who work so hard to complete their education in the face of many challenges.

ABBREVIATIONS

Alliance	Oregon Alliance of Independent Colleges and Universities
EFC	Expected family contribution
FAFSA	Free Application for Federal Student Aid
HECC	Higher Education Coordinating Commission
HB	House Bill
OOG	Oregon Opportunity Grant
ORSAA	Oregon Student Aid Application
OSAC	Office of Student Access and Completion

INTRODUCTION

The Oregon Opportunity Grant (OOG) is Oregon's largest state-funded, need-based grant program for college students. From its inception in 1971 the program has undergone many changes in how it awards funds, the amount of funds awarded, and who is awarded funds. Most recently, House Bill 2407 (2015) clarified how the Higher Education Coordinating Commission's (HECC) Office of Student Access and Completion (OSAC) should prioritize grant awards if funds are not sufficient to serve to all qualified students. The legislative changes in HB 2407 also require the HECC to produce an evaluative report of the OOG to the Legislature in February 2020 and every year thereafter. This is the second annual report, presenting findings on the impact of the OOG on student academic success and performance from academic years 2015-16 to 2019-20.

BACKGROUND ON THE OREGON OPPORTUNITY GRANT

Established in 1971, the OOG is Oregon's largest state-funded, need-sensitive grant program designed to help make postsecondary education more affordable for Oregonians. The Higher Education Coordinating Commission's (HECC) Office of Student Access and Completion (OSAC) administers the grant. Oregon students apply for the OOG simply by completing either the Free Application for Federal Student Aid (FAFSA) or the Oregon Student Aid Application (ORSAA)³; there is no separate application that is specific to the OOG.

Each year, OSAC processes FAFSA/ORSAA forms for more than 200,000 potentially OOG-eligible undergraduate students. Of those, between 30,000 and 40,000 students receive OOG funds each academic year. Over the years, OSAC's processes for determining students' eligibility for the OOG and calculating eligible students' annual award amounts have evolved to accommodate changes in funding levels, legislative priorities, and higher education policies. These are discussed below.

Basic Oregon Opportunity Grant Eligibility Criteria

The OOG is available to eligible students for the equivalent of up to four years (12 quarters or 8 semesters) at full-time enrollment and are prorated for partial-year or half-time enrollment. Students must reapply each year by submitting a FAFSA or ORSAA. To be eligible for the OOG, students must:

- Be an undergraduate student (no prior bachelor's degree).
- Be a U.S. citizen or eligible noncitizen. Be an Oregon resident for at least 12 months prior to the period of enrollment (exceptions made for some dependent students and out-of-state members of Native American tribes with traditional ties to Oregon). Undocumented

³ The ORSAA is the State-approved alternative to the FAFSA for undocumented Oregon students, including those who have Deferred Action for Childhood Arrivals (DACA) status or Temporary Protected Status (TPS) and are not eligible to participate in federal financial aid programs.

students, including students with DACA status, may be eligible if they meet certain additional requirements.

- Be enrolled at least half-time (6 credit-hours/term or more) in the fall term.
- Attend a participating Oregon postsecondary institution (participates in federal Title IV programs and is a public or private non-profit institution located and headquartered in Oregon).
- Have financial need, based on the difference between cost of attendance, federal aid and financial resources of the student and the student's family, if applicable.

Other conditions students must meet to remain eligible for the award include:

- Maintain satisfactory academic progress, as determined by the student's school.
- Have no defaults on federal student loans nor owe refunds of federal student grants.
- Meet all federal Title IV eligibility requirements regarding Selective Service registration and drug-selling convictions.

Additionally, other policies currently in place for students include:

- Must be enrolled at least half-time fall term (quarter/semester) to maintain grant eligibility for the year, unless OSAC approves a fall enrollment waiver. Students who have an authorized award but are enrolled less than half-time in fall or who wait until winter or spring to attend lose their grant eligibility for the year. The only exceptions are for students who are not able to attend fall term due to circumstances beyond their control.
- To be eligible for a guaranteed second-year award, students must meet all existing requirements, be a first-time recipient, be enrolled at least half-time all three terms and have submitted a FAFSA/ORSAA for the upcoming year by May 1.
- Students must submit a new FAFSA or ORSAA for each academic year they plan to attend college or university.
- Students enrolled in courses of study leading to degrees in theology, divinity, or religious education are not eligible.

2019-20 Award Information

For the 2019-20 academic year, OSAC disbursed grants according to the following priorities and guidelines:

Award Priorities. OOG funds are awarded first to students with the greatest financial need. OSAC uses the federally calculated expected family contribution (EFC) to determine financial need and awards

grants based on students' EFCs, starting with EFCs of \$0. OSAC will increase the EFC cutoff and continue to make awards until funds are exhausted. Because available funds may vary year to year, OSAC cannot specify far in advance an exact EFC cutoff or final deadline for receiving a grant. Even if students received the OOG in prior years and filed the FAFSA early, they may not receive a grant if their EFC is higher than the annual limit for the current academic year. The EFC cutoff was \$3,500 for the 2019-20 academic year.

Award Amount. Maximum award amounts for 2019-20 are \$2,700 for students attending a community college and \$3,300 for students attending a public university or Oregon-based independent private non-profit institution. To receive the maximum award amount for 2019-20, students must be enrolled full-time for the full year at an eligible Oregon-based postsecondary institution.

Delivery of Funds to Students. OSAC releases a portion of the annual award to the student's school at the start of each academic term (quarter or semester). The student's school then releases funds to the student's account, based upon the student's enrollment status for the term (full or half-time). Historical and yearly OOG assumptions and awarding criteria are included in Appendix A.

PREVIOUS FINDINGS

The first annual evaluation⁴ of the OOG examined the impact of the 2015 policy change on undergraduate students with the highest financial need. Overall, the report found that the policy change implemented in 2015 was positively associated with the academic success of undergraduate students who received the OOG award, including those students with the highest financial need. OOG recipients, of whom a majority have annual incomes under \$20,000, achieve academic success despite facing myriad challenges. While this trend was found from 2009-10 through 2019-20, the largest shift in OOG awards and funds toward the lowest-income students occurred after 2015.

Findings from last year's report indicate that the 2015 policy change's most meaningful impact was shifting OOG awards and funds away from the highest-income toward the lowest-income recipients. The dollars distributed to students with an adjusted gross income under \$20,000 rose from \$33.5 million in 2015-16 to \$40.6 million the following year. Compared to the prior year, an additional 3,000 students with an income under \$20,000 received an OOG award. However, while the 2015 policy change distributed more dollars to students with the highest financial need, the vast majority of students with financial need still did not receive an OOG award due to lack of available funds. The report found no impact of the 2015 policy change on the representation of race/ethnicity, gender, age, or the first-generation status among OOG recipients. Furthermore, due to rising costs of attendance, a large percentage of today's students, even those who receive an OOG award, have difficulty affording college.

4 Higher Education Coordinating Commission. (2020). Report to the Oregon Legislature: Oregon Opportunity Grant Annual Evaluation, 2020.

<https://www.oregon.gov/highered/research/Documents/Legislative/Oregon-Opportunity-Grant-2020-Evaluation.pdf>

Among those who did receive an award, the report found a positive association between OOG receipt and students' outcomes at Oregon's postsecondary institutions. Retention rates for OOG recipients were equal to or better than those of non-recipients statewide and OOG recipients had similar completion outcomes at community colleges and public universities, where they graduate at similar or better rates than their non-recipient peers.⁵ In addition, requiring students to complete a FAFSA to be eligible for the OOG helps increase the amount of federal dollars (e.g., Federal Pell grants) flowing into the state.

Overall, last year's evaluation found that the State's investment in the OOG, while limited, has had positive benefits. Investing in the OOG not only supports student success and maximizes federal grants for students, but it also improves the State's chances of meeting its educational attainment goals aimed to dramatically increase the education level of Oregonians. Insufficient financial aid for Oregonians hinders progress toward the 40-40-20 educational attainment goal established by ORS 350.014 (2017), which calls for 80 percent of young Oregonians in the education pipeline to earn a postsecondary certificate or degree. It also hinders progress toward the State's recently established adult attainment goal, which calls for increased credentials to prepare for working-age adult Oregonians for projected job growth. The State's investment in financial aid through the OOG is a key state-led mechanism to increase affordability, equity, and student success and meet its attainment goals.

PURPOSE OF REPORT AND MAIN QUESTIONS

In addition to operational changes to how the OOG is awarded, HB 2407 (2015) requires the HECC to submit an annual evaluation of the OOG to the Legislature. This second annual report focuses on evaluating the impact of the OOG on student academic success and performance, as required by the bill, as well as its impact on reducing equity gaps in affordability and in academic success and performance.

Specifically, the report answers the following questions:

1. Who receives the OOG?
2. How effective is the OOG at reducing equity gaps in affordability?
3. What is the academic success and performance of students who received the OOG?

⁵ No independent private non-profit institutional data on completion rates were available for last year's report.

DATA AND METHODS

To answer these questions, we draw on three sources of data. Two sources are student records provided by public and private postsecondary institutions, and the third is state grant information and completed FAFSA/ORSAA records.

The first set of student data is the educational records that Oregon's community colleges and public universities regularly submit to the HECC. These records include descriptive information about student characteristics, enrollment, and completion. From the universities, we include Oregon resident, admitted undergraduates who filed a complete FAFSA/ORSAA, and from the colleges, we include Oregon resident students enrolled for credit who filed a complete FAFSA/ORSAA.

The second source of student data is the educational records that Oregon's independent private nonprofit institutions (the Oregon Alliance of Independent Colleges and Universities, also known as The Alliance⁶) have begun to submit to the HECC in fall 2020 for the purposes of evaluating state financial aid programs, as required by HB 2407 (2015). This new data collection contains information about student characteristics, enrollment, and completion for Oregon resident admitted students who filed a complete FAFSA/ORSAA.

The third source of data is state grant disbursement records that are part of operating the program and completed FAFSA/ORSAA records. These state grant records are merged with student records to obtain an accurate count of students who were eligible for and received OOG awards.

Across the data sources, a key element of evaluating the OOG is the comparison groups with whom we compare OOG recipients' academic success. Ideally, we would compare OOG recipients with students who are just like them (e.g., same income level, same academic preparation, and same first-generation status) but who do not receive the OOG. Unfortunately, though such students likely exist, we do not have a way to identify them. Therefore, we compare students who receive the OOG with another group of students from low-income backgrounds: those whose EFCs are above the limit for the OOG but who are still eligible for the federal Pell grant. Though not identical to students receiving the OOG, students eligible for the Pell grant face many of the challenges that OOG recipients face, such as disproportionately being the first in their families to go to college. The two groups do have slightly different family incomes. Students eligible for the OOG had EFCs of \$3,500 or lower for the 2019-20 academic year, while students eligible for Pell grants but not eligible for the OOG had EFCs between \$3,501 and \$5,576. Finally, we also include students whose EFCs were

⁶ Oregon Alliance of Independent Colleges and Universities (The Alliance) is made up of 14 member institutions; two institutional members do not have students who receive OOG awards: Western Seminary (students are not eligible to receive the OOG) and University of Western States (discontinued its undergraduate program). Two institutions were unable to provide data: Pacific Northwest College of Art (due to impending merger of institution) and Warner Pacific (due to staff changes). One additional Oregon private institution that is not a member of the Alliance but that participates in the OOG did submit data. Participating institutions were: Bushnell University, Corban University, George Fox University, Lewis & Clark College, Linfield University, Multnomah University, National University of Natural Medicine, Pacific University, Reed College, University of Portland, and Willamette University.

above the Pell limit of \$5,576 as another comparison group. Students who did not file a FAFSA/ORSAA are excluded from the analysis.

Together, the answers to these questions provide a thorough evaluation of the current state of the OOG program. We note, however, that this report is descriptive in nature. Variables examined may be related to one another or to external forces not measured here, and causal relationships among variables have not been explored.

WHO RECEIVES THE GRANT?

OOG RECIPIENT CHARACTERISTICS

Statewide, the number of OOG recipients ranges between about 26,000 and 36,000 over the past five years, with some overall decline following the 2015 policy change. This decline is explained largely by higher award amounts offered the past few years. Beginning in the 2017-18 academic year, OOG grants cover a minimum of 13% of the average cost of attendance (differentiated between levels for the average cost of attendance at community colleges and that at public universities⁷). This change necessarily reduced the number of grants that could be awarded but was designed to insulate the lowest income students from educational cost increases.

This pattern is seen across all sectors: at the public universities, community colleges, and independent private non-profit institutions (Alliance). The distribution of students across these three sectors is also mostly stable, with public university students comprising about half of OOG recipients most years, community colleges students comprising just under half, and independent private non-profit students comprising about 4% of OOG recipients.

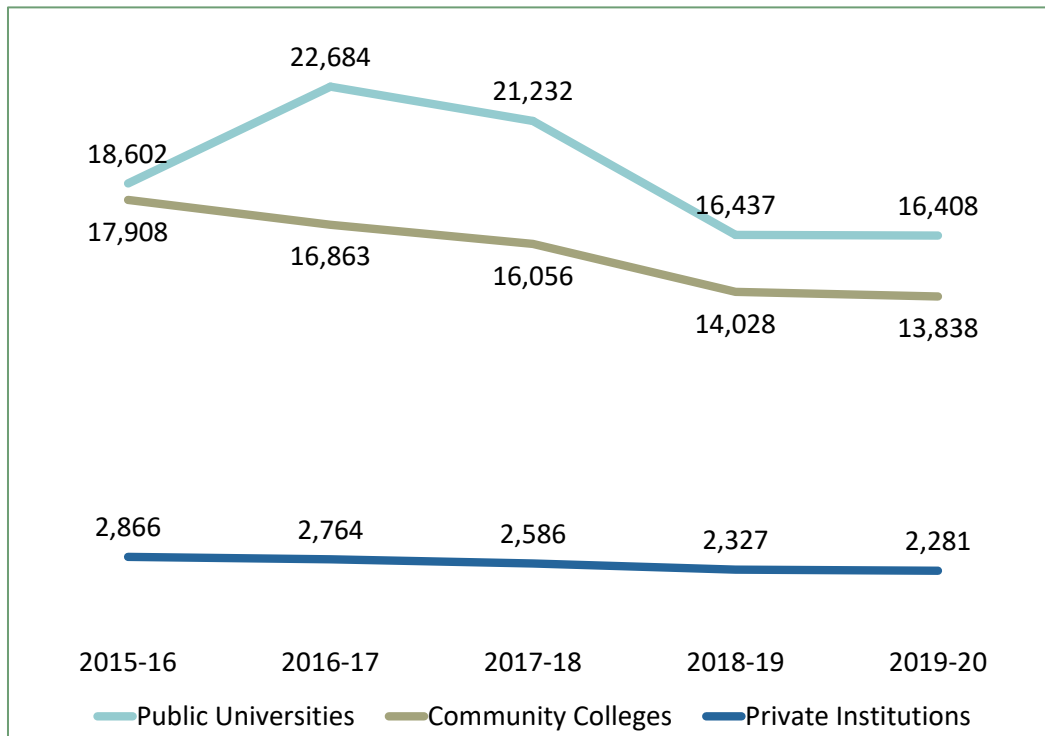


Figure 1. Number of Oregon Opportunity Grant recipients, by sector and year.

While the number of students who receive the OOG has stayed relatively steady across sectors, the characteristics of OOG recipients vary somewhat by sector. All sectors show similar proportions of

⁷ The public university rate applies also to participating private, nonprofit colleges and universities.

students across gender and rural-urban county of origin, but there are sector differences across age and race/ethnicity. Table 1 shows the gender, geographic origin, race/ethnicity, and first-generation status of students who received the OOG in the past year.

Table 1: Characteristics of OOG recipients, by sector.

	Public Universities	Community Colleges	Private, Non-profit
Female	58%	62%	63%
Male	41%	37%	36%
Rural	15%	15%	29%
Urban	85%	82%	64%
Unknown	0%	3%	7%
Asian American	9%	4%	11%
Black/African American	4%	4%	4%
Hispanic/Latinx	20%	24%	29%
Native American/ Alaska Native	1%	2%	0%
Native Hawaiian/ Pacific Islander	1%	1%	0%
Two or more	7%	7%	7%
White	54%	55%	42%
Not reported	4%	5%	6%
Under 25	70%	64%	85%
25 and up	30%	36%	15%
First generation	48%	42%	N/A
Not first generation	39%	40%	N/A
Not reported	13%	18%	N/A

Gender representation among OOG recipients is similar across sectors, with about 60% of OOG recipients identifying as female. As with Oregon college and university students in general, OOG recipients also predominately come from urban areas, with just over 80% of students coming from urban counties at both public universities and community colleges. At the private, non-profit institutions, 64% of OOG recipients come from urban areas.⁸

There is more variation across sectors in the racial/ethnic breakdown of OOG recipients. Asian American students make up between 4% and 11% of recipients, and Hispanic/Latinx students make up between 20% and 29% of recipients, depending on the sector. White students make up just over half of OOG recipients at the public universities and community colleges (54% and 55%, respectively) and just under half at the private, nonprofit institutions.

By age, Table 1 shows that most OOG recipients are age 18 to 24. The percentage varies across the sectors, however. Over one-third of OOG recipients at community colleges are over age 25, and 30% of those at the public universities are, compared to 15% at the independent, nonprofit schools. .

Finally, nearly half of OOG recipients at the public universities and 42% of recipients at the community colleges were the first in their families to attend college. The newness of the data from the independent, nonprofit schools limited our ability to calculate this measure for those institutions.

OOG RECIPIENTS COMPARED TO OTHER STUDENTS

How do OOG recipients compare to other students on these characteristics? OOG recipients are disproportionately students of color, female, rural, and first-generation. The figures below show the percentage of all FAFSA/ORSAA filing students with different characteristics in each of the three income groups. The darkest color represents the lowest income group (OOG recipients), the middle color represents the other, slightly higher low-income group (i.e., Pell recipients with EFC's above the OOG limit), and the lightest color represents the middle/upper income group (those who filed a FAFSA/ORSAA but are not eligible for Pell nor OOG).

Figure 2 shows the state-level differences by race/ethnicity, with the sector-specific percentages shown in Table 2. Students of color are disproportionately represented in the lowest-income group, which is served by the OOG. Students of color are more likely than their white counterparts to be in one of the lower income groups, and the proportions are particularly high for Black/African American, Hispanic/Latinx, and Native American/Alaska Native students. Nearly one-third of students who identify as Asian American, Black/African American, Hispanic/Latinx, or Native American/Alaska Native are served by the OOG, compared to 23% of white students.

⁸ Some schools were not able to report these data. Six of the private, nonprofit schools reported data on county of origin of their OOG recipients.

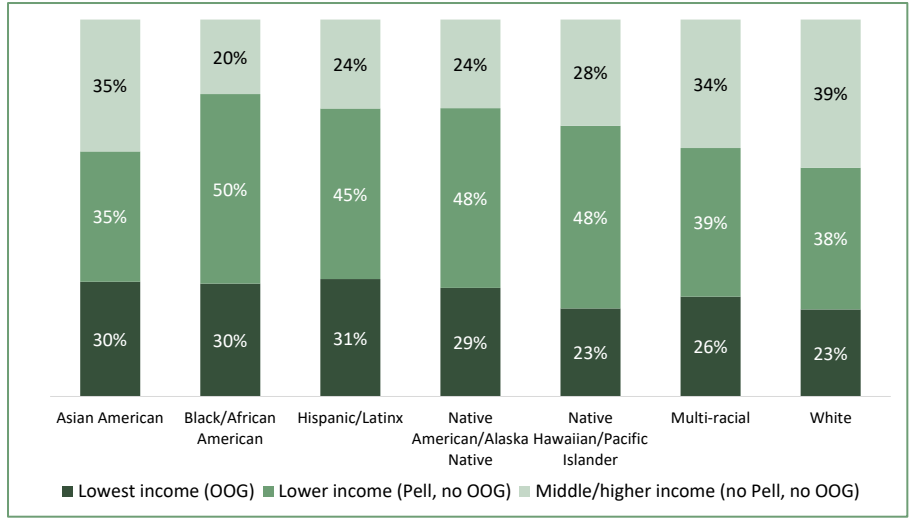


Figure 2: EFC distribution of Oregon students across racial/ethnic groups.

Table 2: EFC distribution of students across racial/ethnic groups, by educational sector.

		Public Universities	Community Colleges	Private, Non-profit
Asian American	Lowest income (OOG)	38%	23%	24%
	Lower income (Pell, not OOG)	19%	47%	5%
	Middle/upper income	43%	30%	72%
Black/African American	Lowest income (OOG)	46%	26%	32%
	Lower income (Pell, not OOG)	25%	59%	6%
	Middle/upper income	29%	15%	62%
Hispanic/Latinx	Lowest income (OOG)	44%	27%	41%
	Lower income (Pell, not OOG)	26%	52%	9%
	Middle/upper income	30%	21%	50%
Native American/ Alaska Native	Lowest income (OOG)	40%	24%	7%
	Lower income (Pell, not OOG)	28%	58%	7%
	Middle/upper income	32%	19%	86%
Native Hawaiian/ Pacific Islander	Lowest income (OOG)	33%	21%	17%
	Lower income (Pell, not OOG)	30%	52%	17%
	Middle/upper income	36%	27%	66%
Two or more	Lowest income (OOG)	33%	24%	22%
	Lower income (Pell, not OOG)	21%	49%	7%
	Middle/upper income	46%	27%	71%
White	Lowest income (OOG)	28%	21%	12%
	Lower income (Pell, not OOG)	20%	47%	5%
	Middle/upper income	46%	32%	83%

Figure 3 shows similar information by gender. For this and subsequent characteristics, we include the educational sectors in the same chart. Figure 3 shows that in each sector, women are disproportionately in the lower income groups and served by the OOG.

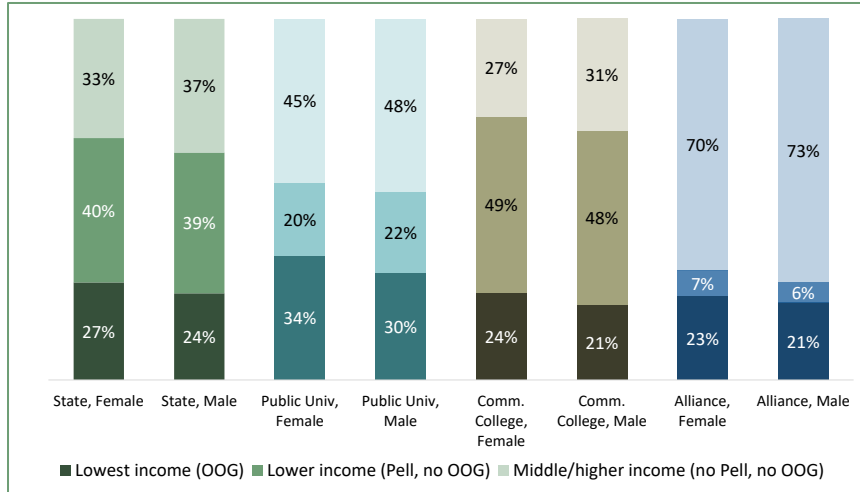


Figure 3: EFC distribution of Oregon students by gender and educational sector.

Similarly, Figure 4 shows how rural students are more often in the lower income groups and receiving an OOG. Though the distribution is similar—28% of rural students are OOG recipients, compared to 25% of urban students—the rate is consistently higher across all sectors.

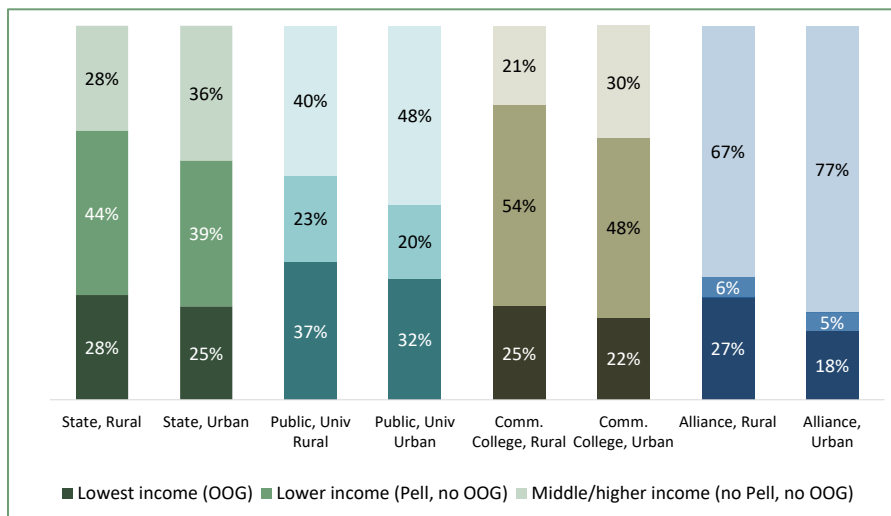


Figure 4: EFC distribution of Oregon students by geographic origin and educational sector.

For age, the results are more complex. Younger and older students statewide and in the community colleges are as likely to be receiving the OOG (Figure 5). Older students at the public universities are more likely to be in the lowest income group, whereas the opposite is the case at the private institutions.

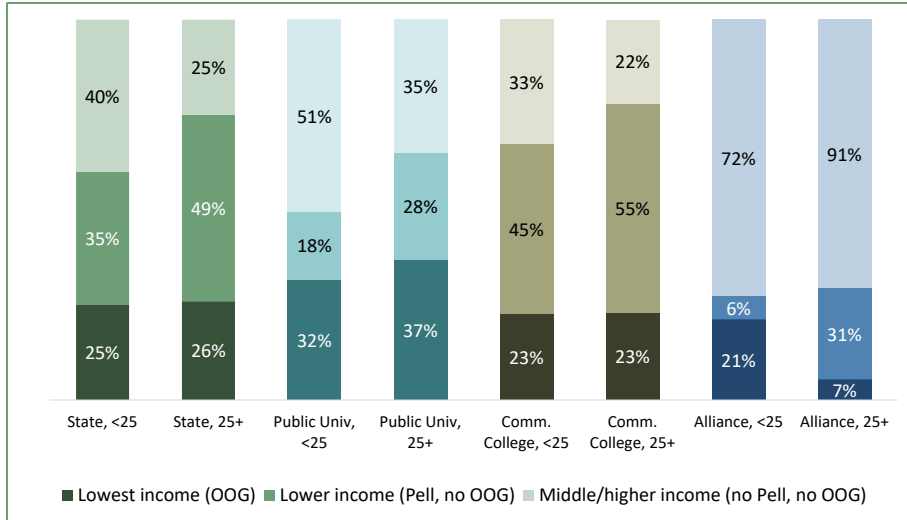


Figure 5: EFC distribution of Oregon students by student age and educational sector.

Finally, Figure 6 shows the same information for first generation status for the students in public institutions. Students who are the first in their families to go to college or university are disproportionately represented among OOG recipients at both public universities and community colleges.

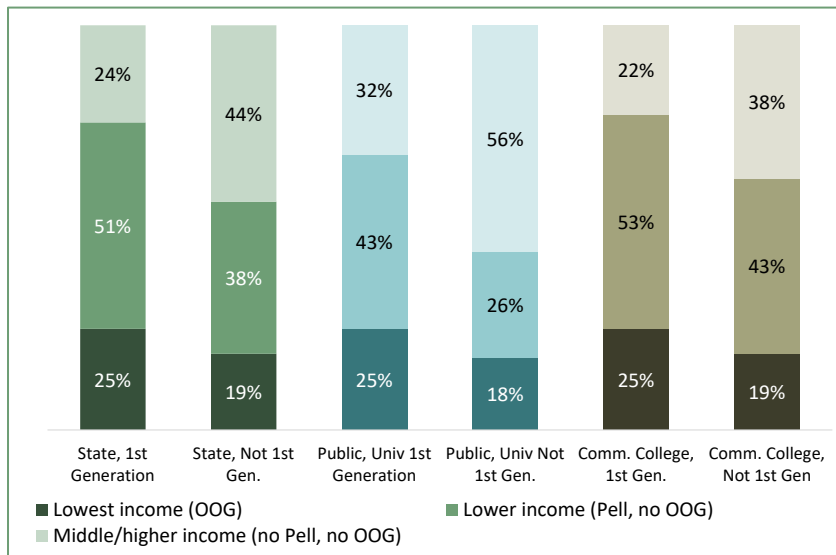


Figure 6: EFC distribution of Oregon students by first-generation status and educational sector.

Taken together, we see that the OOG serves students in many historically underserved groups. In addition to coming from low-income families, they are disproportionately women, rural, students of color, and first-generation.

DOES THE OOG HELP REDUCE EQUITY GAPS IN AFFORDABILITY?

The cost of attendance in college and university is prohibitive for many and can be a barrier for students from the lowest income backgrounds. Cost of attendance extends well beyond tuition and fees and includes housing, books and supplies, transportation, and personal expenses. For students with children, the cost of child care can add significantly to this total. We estimate the percentage of students facing unaffordable costs by comparing their costs of attendance with their expected revenue. We designate students whose costs outweigh revenue as facing unaffordable costs.

The costs of attendance are estimated by each institution as the overall “sticker price” of attendance at their institution. In reality, many public universities discount this price, especially regarding tuition and fees, and we take this institutional aid into account as a source of revenue. The expected revenue includes any federal and state grants a student receives, most scholarships received, institutional aid provided by public universities, the student’s EFC based on their FAFSA/ORSA, and an estimate of student’s earnings. The estimate of student’s earnings is 90% of minimum wage for 15 hours per week and 48 weeks per year.⁹ This measure is currently available for students attending a public university or community college who filed a complete FAFSA/ORSA, and we look forward to incorporating the private, non-profit institutions in upcoming years.

Overall, 60% of Oregon residents, admitted undergraduates at the universities, and 31% of community college students face unaffordable costs (among those who completed a FAFSA/ORSA). These rates are much higher for low-income students (Figure 7). Among these students in the lowest income group at the public universities, 78% are unable to afford the average cost of their respective university, even after taking into account grant, scholarship, and institutional aid; the EFC, and the estimate of student earnings. Among OOG recipients attending community colleges, 47% of students are unable to afford the cost of college. Thus, despite receiving the OOG award, students who receive the OOG still face considerable challenges in affording the cost of attending postsecondary education.

Compared to other low-income students, those who did not receive the OOG but did receive a federal Pell grant, the rates of unaffordability are similar at the universities and higher at the colleges. Among these lower-income students at the public universities, 73% faced unaffordable costs. Among these lower-income students at the community colleges, 37% faced unaffordable costs. Thus, the lowest income students at the colleges are much more likely to face financial burdens—despite receiving the OOG—than other low-income students whose incomes are just above the OOG limit.

⁹ This formula came from an estimate formerly used in State financial aid policy.

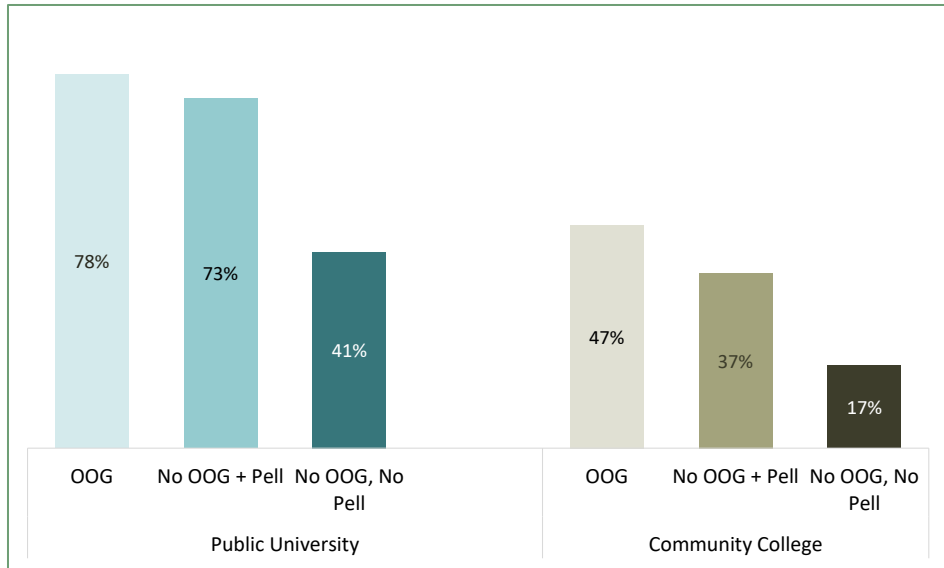


Figure 7: Percent of students unable to meet expected costs of education with expected resources, by EFC level and sector.

This pattern of higher rates of unaffordable costs among OOG recipients compared to other students persists across student characteristics, including age, gender, rural-urban, and race/ethnicity. Results are shown in Appendix B. These findings suggest that OOG has not eliminated equity gaps in affordability.

However, even if the OOG has not eliminated the affordability challenge or equity gaps in affordability, it still contributes to the resources students have to pay for college. How much is the OOG improving affordability? In addition to the fact that every dollar in grant aid reduces the unmet need for a student (presumably filled by loans), we can also measure how many more students would have unmet need if the OOG were not in place. We estimated how many more students would be facing unaffordable costs if they lacked the OOG, and the results are notable. At the public universities, the number of students facing unaffordable costs would rise from 60% to 63% without the OOG. At the community colleges, the number of students facing unaffordable costs would rise from 31% to 35%. Statewide, this translates to nearly 4,000 students. Thus, in addition to expanding the resources, the OOG helps nearly 4,000 students close the gap between resources and expected costs entirely.

The impact of the OOG is even higher, however, for many historically underserved students. At the universities, the OOG makes about 4% more students of color able to afford the cost of their university education, with impacts highest for Black/African American and Hispanic/Latinx students. Similarly, 4% more first-generation students at the universities would face unaffordable costs if the OOG were not in place. Appendix B shows these results in detail.

At the colleges, the results are more complex. As at the universities, the OOG results in more students being able to afford the cost of education across all racial/ethnic groups, but the results are strongest for Native American/Alaska Native and Hispanic/Latinx, and White students. They are

somewhat less strong for Asian American, Black/African American, and Native Hawaiian/Pacific Islander students. Asian American students face the highest rates of unaffordability in general. The OOG also results in proportionally more first-generation students being able to afford the cost of their college education. Appendix B shows these results in detail.

Together, these findings indicate that while the OOG does not resolve the affordability challenge faced by students in Oregon, nor the equity gaps in that affordability, it provides needed support that results in measurably more students able to afford the cost of college. Moreover, many of the groups for which the OOG improves affordability the most are historically underserved.

WHAT IS THE ACADEMIC SUCCESS AND PERFORMANCE OF OOG RECIPIENTS?

Though the OOG award does not alleviate all of the unaffordable costs faced by students, those receiving the award show great success in their postsecondary careers. Compared to similar students who do not receive an OOG award, OOG students show similar, and in some cases slightly better, rates of retention and completion.

CONTINUATION

Fall-to-fall retention captures students' momentum in their postsecondary careers. We measure it with the percentage of students who enrolled in fall term and returned to their institution the following fall. Across sectors, the percentage of OOG recipients who enrolled in fall 2018 and returned in fall 2019 ranged from 66% to 83%, as shown in Figures 8 through 10 below. These retention rates were somewhat higher than those of students who received a Pell grant but not an OOG, which ranged from 62% to 77%.

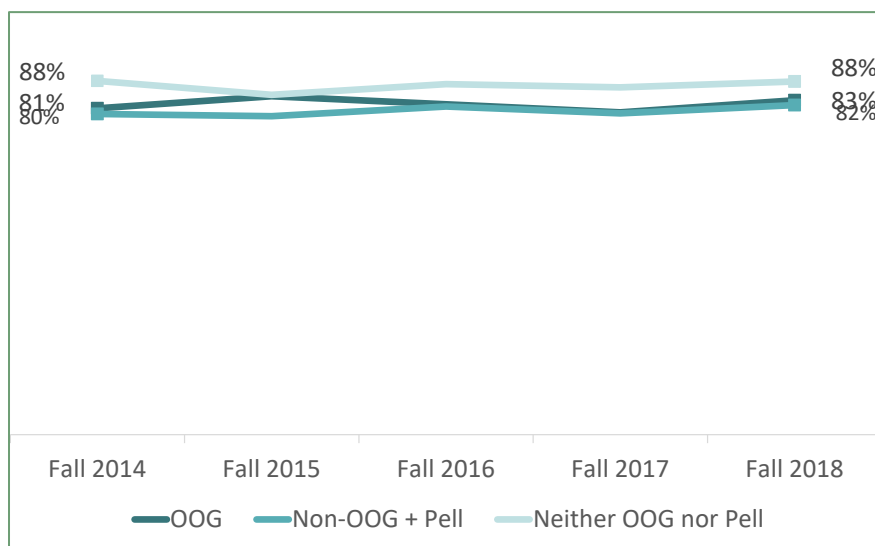


Figure 8: Retention rate of Oregon resident admitted undergraduates at public universities, by EFC level and year.

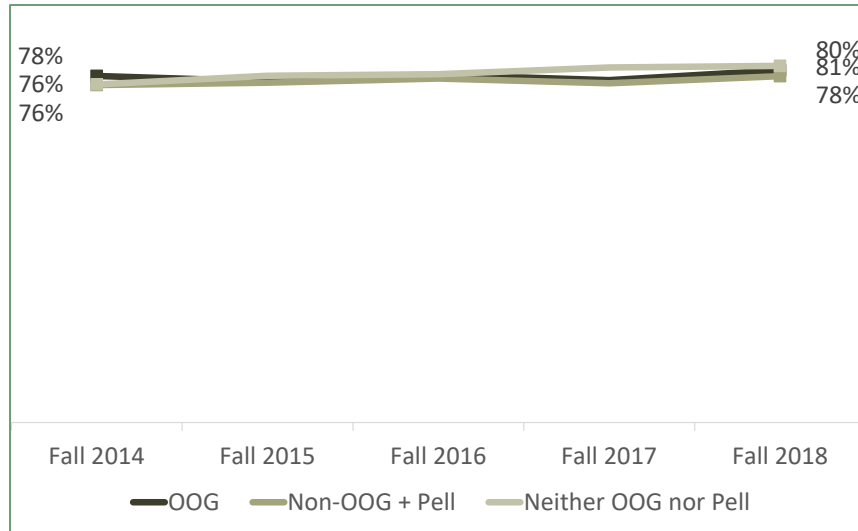


Figure 9: Retention rate of Oregon resident for-credit students at community colleges, by EFC level and year.

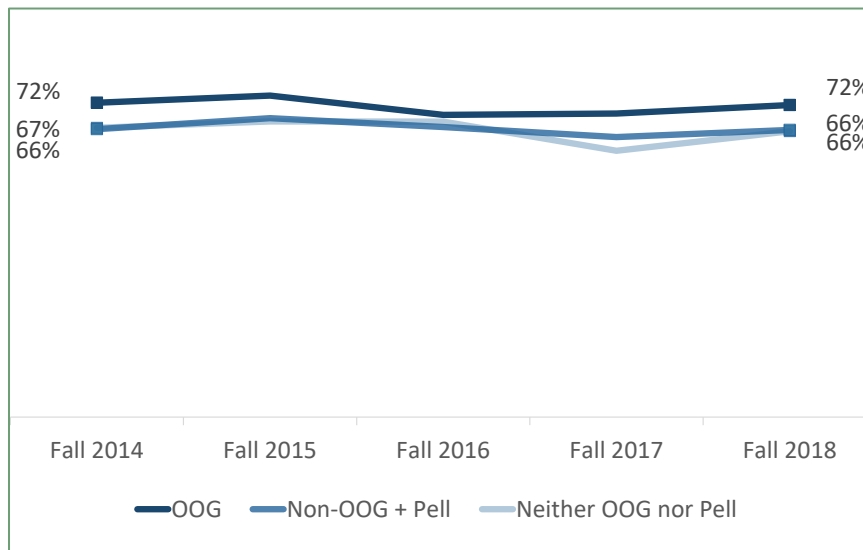


Figure 10: Retention rate of Oregon resident admitted undergraduates at private institutions, by EFC level and year.

This pattern of OOG recipients having comparable rates of retention as non-OOG recipients was largely persistent across student characteristics (see Appendix C). In particular, this pattern holds across student age, gender, and geographic origin (rural-urban) status. However, the higher OOG retention rates does not hold across all racial/ethnic groups. Specifically, OOG recipients at community colleges who were Asian American and Native American/Alaska Native had slightly lower rates of retention than their non-OOG, Pell recipient peers. Among OOG recipients at public

universities, Native American/Alaska Native students also had slightly lower completion rates than their non-OOG, Pell recipient peers.

COMPLETION

The most important marker of postsecondary success for later economic stability is the completion of a program of study. For bachelor’s degree-granting institutions (public universities and Alliance institutions), we define completion as graduation: the percentage of first-time, full-time freshmen who earn their degree within six years of entrance to the university. For associate degree-granting institutions (community colleges) we define completion as the percentage of new, credential-seeking students who earned an associate degree or career certificate or who transferred to any four-year institution nationwide within four years of starting at that college. Credential-seeking students are those who were new to the college in the fall, were not enrolled in dual credit/accelerated learning, and earned at least 18 quarter credits or a credential over their first two years at the college.

Students who received the OOG completed their programs at rates that are comparable or higher than other students (Figure 11). Despite coming from the lowest income backgrounds, 61% of students who had received an OOG at a public university and 82% of those at a private, non-profit university graduated within six years. In comparison, graduation rates were lower for other low-income students (those who did not receive an OOG but did receive a Pell grant), with 47% of these students at the public universities and 78% at the private institutions earning their bachelor’s degree. Graduation rates were somewhat higher for public university students from middle/higher income backgrounds (those receiving neither an OOG nor a Pell grant); 73% of these students earned a bachelor’s degree within six years. Similarly, 75% of students in this group earned a bachelor’s degree within six years at the private institutions.

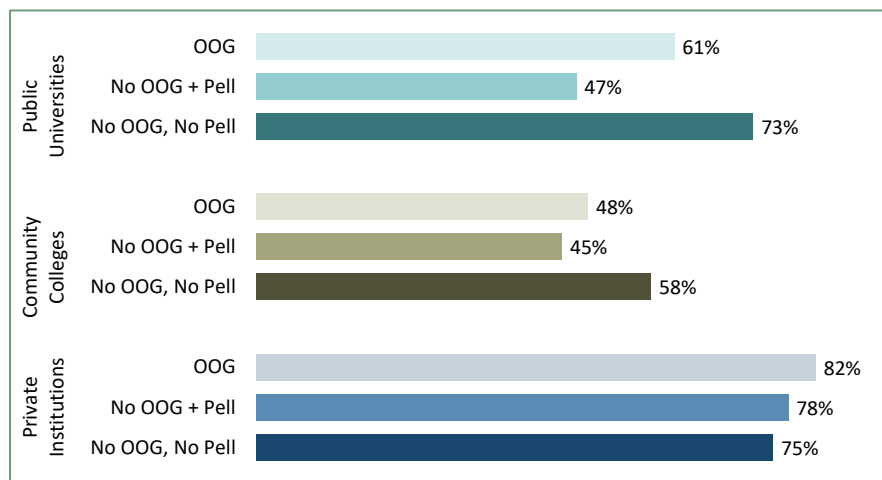


Figure 11: Completion rate of Oregon resident undergraduates, by EFC level and educational sector.

At the colleges, completion rates are more similar across the two low-income groups, but OOG recipients still have slightly higher completion rates than other low-income students. Both low-income groups have lower rates than middle/upper income students. Among OOG students 48% earned a credential or transferred to a four-year institution within four years, compared to 45% of Pell recipients who did not receive an OOG. Students from middle/upper income backgrounds were more likely to complete; 58% of those students earned a credential or transferred within four years.

As with retention rates, this pattern of OOG recipients having higher rates of completion than other low-income students and lower rates than middle/upper income students is largely persistent across student characteristics (see Appendix C). In particular, this pattern holds across student age, gender, and rural-urban status. However, the pattern does not hold across all racial/ethnic groups. Specifically, OOG recipients at community colleges who were Asian American and Native American/Alaska Native had lower rates of completion than their non-OOG, Pell recipient peers. Among OOG recipients at public universities, Native American/Alaska Native students also had slightly lower retention rates than their non-OOG recipient peers. Without diminishing the significance of economic barriers, this highlights that other factors contribute to a student's set of barriers and resources, as reported by many students.

TIME TO DEGREE

Another measure of student success and performance is the time it takes for students to complete their programs of study. In addition to measuring success, time to degree also has implications for the financial impacts of completing a degree: the longer it takes to complete, the more costs of education students have to cover. These include both direct costs and the opportunity cost of not being in a higher-paying job after graduation. We measure time to completion as the years between first admission to an institution and the year of their degree.¹⁰ This measure is currently available for student at the public institutions.

As with retention and completion, OOG recipients have somewhat stronger time-to-completion rates than other low-income students (Figure 12). OOG recipients at the public universities complete their bachelor's degrees one-half year earlier than their counterparts who did not receive an OOG but did receive a Pell grant. This finding of faster completion among OOG recipients was evident for graduates from 2015-16 through 2018-19. We found similar but less strong results for community

¹⁰ We measured students' OOG receipt and EFC level two ways for assessing time to degree. First, we measured these at any point in students' undergraduate careers. We included students in the OOG group if they received an OOG at any point in their undergraduate careers. We included students in the comparison low-income group who received a Pell grant at any point in their undergraduate careers but never received an OOG, and we included students who never received an OOG nor a Pell grant in the highest EFC group. The results from this approach are shown in Table 3. Second, we measured OOG receipt and EFC level in only a single year. For community college students, we measured whether they received an OOG or Pell grant the year they completed their degree, and for public university students, we measured whether they received the grants in their first year at the university. In both cases, results were similar to the results shown in Table 3: students in the OOG group completed their degrees faster or in the same amount of time as students who received a Pell grant but not an OOG. This was the case for the past four years of graduates.

college graduates: OOG recipients completed their associate degrees in the same amount of time or slightly faster as students who did not receive an OOG but did receive a Pell grant. This findings suggest that while students receiving the OOG face high rates of unaffordable costs, they experience some financial relief in terms of completing their degree sooner.

Table 3: Time to degree in years, by educational sector, EFC level, and year.

	Graduation year	Students with OOG (lowest income)	Students with Pell grant but not OOG (low income)	Students with neither OOG nor Pell grant (middle/higher income)
Associate degree graduates at community college	2015-16	3.5	3.9	3.0
	2016-17	3.8	3.8	3.0
	2017-18	3.8	4.0	3.0
	2018-19	3.8	3.8	2.8
Bachelor’s degree graduates at public university	2015-16	4.0	4.5	3.7
	2016-17	4.0	4.5	3.7
	2017-18	4.0	4.2	3.7
	2018-19	4.2	4.7	3.7

As with other student outcome measures, we find these patterns of OOG recipients less or the same amount of time to complete their degrees as other students from low-income backgrounds across student characteristics. Across race/ethnicity, age, gender, and rural-urban groups, public university OOG recipients tend to graduate in less time than their peers who did not receive an OOG but did receive a Pell grant (see Appendix C). The rare exceptions to these trends did not hold in earlier years.

In general, students receiving an OOG progress in college and university comparably and often better than other low-income students. For the students from the lowest-income backgrounds, receipt of the OOG is associated with higher retention and graduation rates across sectors and with shorter or comparable times to degree, compared with other students from low-income backgrounds. Some exceptions to these trends exist, but those tend to be among groups that are small in size, for which results can be more volatile.

CONCLUSIONS AND RECOMMENDATIONS

SUMMARY OF FINDINGS

The OOG provides financial support to more than 30,000 students each year. About half of these students attend one of Oregon's seven public universities, just under half attend one of Oregon's 17 community colleges, and about 4% attend one of 13 private, independent colleges and universities in the state.

Students who receive the OOG include all racial/ethnic, gender, age, and geographic groups. Some are the first in their families to attend college. At the public universities, they are disproportionately older, while at the community colleges and private institutions, they are most often younger. In addition to supporting students from the lowest income families, the program disproportionately serves students in groups that have and that continue to be some of the most marginalized in education: historically underserved racial/ethnic groups, women, rural, and first-generation-college students. Students in each of these groups are disproportionately represented in the OOG.

Students receiving the OOG still face significant affordability challenges. More than three-fourths of OOG recipients at the public universities and half at the community colleges cannot pay the cost of their education, even with their grants and scholarships, EFCs, and estimated own earnings. For university students, this number is still higher than the number of the next highest low-income group, and it is 20 percentage points higher than other low-income students at the community colleges. These high rates of unaffordability persist across racial/ethnic, gender, age, and rural-urban status.

Though the OOG does not alleviate the affordability challenges of postsecondary education today, it does have an impact. If the OOG were not in place, nearly 4,000 additional students would face costs of education that they could not afford. Moreover, the impact of the OOG was stronger for some historically underserved groups, including first-generation students in both sectors, Black/African American and Hispanic/Latinx students at the universities and Native American/Alaska Native and Hispanic/Latinx at the colleges, as well as for white students at the community colleges.

OOG recipients show strong progress through college and university. Across all three sectors, they show slightly higher retention than other low-income students (those who qualify for federal aid but whose EFC is higher than the OOG limit). This finding holds across nearly all student characteristics. Middle and upper income students (those who did not qualify for an OOG or a Pell grant) show the highest retention rates.

Similarly, OOG recipients are more likely to complete a course of study than other low-income students, across all three educational sectors. Middle/upper income students have the highest graduation and completion rates. This pattern holds across most racial/ethnic groups and across student age, gender, and rural-urban status. Native American/Alaska Native students at the community colleges and universities and Asian American students at the community colleges had slightly lower rates of completion than other low-income students, though we caution against over-

interpretation of this finding because of small numbers. OOG recipients who complete a bachelor's degree do so faster (by about one-half year) than other low-income students, and those who complete an associate degree do so in similar or slightly less time than other low-income students.

In general, students who receive an OOG are disproportionately from groups facing multiple equity barriers and who continue to face affordability challenges even after receiving the grant. Nevertheless, the findings here show that they succeed in college and university comparably and often better than other low-income students.

THE COST AND BENEFITS OF THESE SUCCESSES

The State devotes more than \$150 million each biennium in direct support of low-income Oregonians' pursuit of postsecondary education with the OOG. For nearly all OOG recipients, this investment is amplified by the federal Pell grants that accompany the OOG. The returns on this investment are experienced by individuals, communities, and the State.

The higher graduation rates of OOG recipients compared to similar low-income students is the initial return on this investment. It is consistent with research that finds grant aid in any form (public or private, need-based or merit-based) increases a student's probability of completing their degree program.¹¹ Further, the findings here in Oregon are consistent with research showing that state grants in particular increase the probability that a student will complete their degree, by 2.5 percentage points for on-time completion and 3.0 percentage points for delayed completion.¹²

The comparable or higher graduation rates of OOG recipients open the door for the lifelong benefits of postsecondary education for individuals and families. Earnings rise and unemployment falls at every successive level of postsecondary educational attainment, such that persons with a bachelor's degree earn 64% more than persons with a high school diploma, and those with a graduate degree earn more than twice what high school graduates earn, on average.¹³ These benefits include not only higher earnings, but also greater health and life expectancy.¹⁴

¹¹ Reference: Nguyen, T. D., Kramer, J. W., & Evans, B. J. (2019). The Effects of Grant Aid on Student Persistence and Degree Attainment: A Systematic Review and Meta-Analysis of the Causal Evidence. *Review of Educational Research*, 89(6), 831-874.

¹² Nugyen, et al, *ibid*.

¹³ U.S. Bureau of Labor Statistics, U.S. Department of Labor (2019). "Education Pays. Available at <https://www.bls.gov/emp/education-pays-handout.pdf> .

Opportunity Insights (2019). "The Role of Oregon Colleges and Universities in Economic Mobility," Presentation to the Higher Education Coordinating Commission October Meeting.

¹⁴ The College Board (2016). *Education Pays: The Benefits of Higher Education for Individuals and Society*. Available at <https://research.collegeboard.org/pdf/education-pays-2016-full-report.pdf> .

Access to higher education also changes the outlook for future generations, as postsecondary education is a key driver of upward mobility. About 2/3 of students at Oregon public universities and about half of those at community colleges who come from the lowest-income families will be in the middle class by the time they are in their mid-30s—even if they did not graduate.¹⁵ OOG recipients are three times as likely to be first-generation college students as those who do not receive an OOG. The upward mobility afforded by attending an Oregon college or university brings economic stability for families, which in turn stabilizes communities. Beyond local communities, higher earnings yield higher tax revenue for communities and the State, and postsecondary education correlates with increased voting and volunteerism and improved family health.¹⁶

This work of converting families' financial instability into reliable economics is also essential for the State's economic recovery from the COVID-19 recession. The lowest income communities that have borne the brunt of the economic crisis cannot move into lasting stability without access to the higher-paying jobs that postsecondary credentials provide.

The OOG does not single-handedly open the door to postsecondary education and the benefits it provides. However, combined with other public grants, scholarships, and aid from institutions, the OOG makes postsecondary education possible for many students. Further, it insulates the lowest-income students from tuition increases and limits the amount of student debt with which they will be burdened.

The success of OOG recipients in school, combined with the fact that the program disproportionately serves students who face multiple barriers to an equitable postsecondary education, indicates that the main limitation of the OOG is insufficient resources to serve more students. The continued affordability challenges faced by low-income students point to substantial additional need for the OOG. If Oregon is going to meet its educational goals and enjoy the economic and social stability that accompany them, expanded state-based financial aid seems not only warranted but required.

¹⁵ Opportunity Insights (2019). "The Role of Oregon Colleges and Universities in Economic Mobility," Presentation to the Higher Education Coordinating Commission October Meeting.

¹⁶ The College Board (2016). *Education Pays: The Benefits of Higher Education for Individuals and Society*. Available at <https://research.collegeboard.org/pdf/education-pays-2016-full-report.pdf>.

<https://trends.collegeboard.org/sites/default/files/education-pays-2016-full-report.pdf>

APPENDIX A. OREGON OPPORTUNITY GRANT ASSUMPTIONS AND AWARDING CRITERIA

Appendix A Table 1: Average annual cost of attendance by sector and thresholds for receiving federal Pell grants and OOG awards, 2009-10 through 2019-20.

	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20
Average yearly cost of attendance for public universities	\$18,536	\$18,966	\$19,852	\$20,693	\$21,192	\$21,540	\$22,263	\$23,466	\$24,474	\$25,232	\$25,908
Average yearly cost of attendance for community colleges	\$15,404	\$15,459	\$16,415	\$17,031	\$17,374	\$17,735	\$18,223	\$19,147	\$19,893	\$20,485	\$20,796
Yearly maximum EFC to receive a Federal Pell Grant	4,617	4,617	5,273	4,995	5,081	5,157	5,198	5,234	5,328	5,486	6,195
Yearly awarding criteria limits, OOG	\$70,000	\$70,000	\$70,000	\$70,000	\$70,000	\$70,000	\$4,000	\$3,500	\$3,500	\$3,500	\$3,500
Yearly awarding criteria metric	AGI						EFC				

Appendix A Table 2: Annual dates for awarding OOG funds from 2009-10 to 2019-20.

Dates for awarding OOG	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20
Community colleges	8/15/2009	1/21/2010	2/4/2011	1/31/2012	1/31/2013	2/5/2014	3/21/2015	8/25/2016	8/1/2017	4/30/2018	6/1/2019
Public universities		1/29/2010	1/31/2011				3/14/2015				
Private, non-profit institutions		2/24/2010	2/20/2011								

Appendix A Table 3: Average OOG disbursement amounts, by sector, 2009-10 to 2019-20.

Average OOG disbursement amounts	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20
Community colleges	\$1,656	\$1,254	\$1,273	\$1,384	\$1,404	\$1,382	\$1,429	\$1,502	\$1,533	\$1,774	\$1,835
Public universities	\$1,950	\$1,583	\$1,746	\$1,766	\$1,796	\$1,762	\$1,819	\$1,909	\$1,910	\$2,766	\$2,901
Private, non-profit institutions	\$2,019	\$1,609	\$1,748	\$1,768	\$1,794	\$1,775	\$1,876	\$1,985	\$1,979	\$2,889	\$2,919
Overall	\$1,775	\$1,452	\$1,499	\$1,569	\$1,600	\$1,579	\$1,639	\$1,696	\$1,714	\$2,277	\$2,364

Appendix A Table 4: Annual maximum and minimum OOG award amounts by sector from 2009-10 to 2019-20.

Maximum and minimum OOG award amounts	2009-10**	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20
Community college maximum	\$2,600	\$1,800	\$1,800	\$1,950	\$2,000	\$2,000	\$2,100	\$2,250	\$2,250	\$2,600	\$2,778
Public university maximum	\$2,675	\$1,950	\$1,950	\$1,950	\$2,000	\$2,000	\$2,100	\$2,250	\$2,250	\$3,200	\$3,600
Minimum award, all sectors	\$400	\$400	\$400	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Private, non-profit institution average maximum award*	\$2,675	\$1,950	\$1,950	\$1,950	\$2,000	\$2,000	\$2,100	\$2,250	\$2,250	\$3,200	\$3,600
	**For 2009-10, maximum award = \$3200; maximum calculated award = \$2675 for most students			<i>*flat award amount</i>	<i>*flat award amount</i>	<i>*flat award amount</i>	<i>*flat award amount</i>	<i>*flat award amount</i>	<i>*flat award amount</i>	2-tiered award amount	2-tiered award amount

APPENDIX B. AFFORDABILITY RATES BY STUDENT CHARACTERISTICS AND EXISTENCE OF OOG PROGRAM

OVERALL AFFORDABILITY RATES BY STUDENT CHARACTERISTICS

Appendix B Table 1: Percentage of students facing unaffordable costs by sector and EFC level.

	Public Universities			Community Colleges		
	OOG	Non-OOG/ Pell	Non-OOG/ Non-Pell	OOG	Non-OOG/ Pell	Non-OOG/ Non-Pell
Fall 2018 - Fall 2019	78%	73%	41%	51%	35%	23%

PUBLIC UNIVERSITIES – PERCENT FACING UNAFFORDABLE COSTS

Appendix B Table 2: Percentage of students facing unaffordable costs at public universities by EFC level and race/ethnicity.

Fall 2018 - Fall 2019	OOG	Non-OOG/Pell	Non-OOG/Non-Pell
Asian American	85%	75%	47%
Black/African American	77%	67%	42%
Hispanic/Latinx	78%	73%	46%
Native American/Alaska Native	65%	65%	38%
Native Hawaiian/Pacific Islander	76%	56%	46%
Two or more	78%	74%	40%
White	78%	73%	39%
Not reported	78%	65%	44%

Appendix B Table 3: Percentage of students facing unaffordable costs at public universities currently and percent who would be facing unaffordable costs if the OOG program did not exist, by race/ethnicity.

Fall 2018 - Fall 2019	Percent currently facing unaffordable costs	Percent who would be facing unaffordable costs if the OOG program did not exist
Asian American	67%	70%
Black/African American	65%	70%
Hispanic/Latinx	68%	72%
Native American/Alaska Native	57%	61%
Native Hawaiian/Pacific Islander	59%	63%
Two or more	60%	63%
White	58%	60%
Not reported	62%	66%

Appendix B Table 4: Percentage of students facing unaffordable costs at public universities by EFC level and gender.

Fall 2018 - Fall 2019	OOG	Non-OOG/Pell	Non-OOG/Non-Pell
Female	77%	71%	40%
Male	80%	75%	41%
Not reported	69%	70%	44%

Appendix B Table 5: Percentage of students facing unaffordable costs at public universities by EFC level and rural/urban status.

Fall 2018 - Fall 2019	OOG	Non-OOG/Pell	Non-OOG/Non-Pell
Rural	69%	66%	40%
Urban	80%	73%	41%

Appendix B Table 6: Percentage of students facing unaffordable costs at public universities by EFC level and age.

Fall 2018 - Fall 2019	OOG	Non-OOG/Pell	Non-OOG/Non-Pell
18-24	80%	78%	40%
25+	73%	64%	44%

COMMUNITY COLLEGES – PERCENT FACING UNAFFORDABLE COSTS

Appendix B Table 7: Percentage of students facing unaffordable costs at community colleges by EFC level and race/ethnicity.

Fall 2018 - Fall 2019	OOG	Non-OOG/Pell	Non-OOG/Non-Pell
Asian American	58%	41%	28%
Black/African American	48%	32%	25%
Hispanic/Latinx	5%	34%	27%
Native American/Alaska Native	47%	30%	24%
Native Hawaiian/Pacific Islander	48%	36%	20%
Two or more	52%	40%	23%
White	48%	35%	21%
Not reported	55%	36%	24%

Appendix B Table 8: Percentage of students facing unaffordable costs at community colleges currently and percent who would be facing unaffordable costs if the OOG program did not exist, by race/ethnicity.

Fall 2018 - Fall 2019	Percent currently facing unaffordable costs	Percent who would be facing unaffordable costs if the OOG program did not exist
Asian American	37%	41%
Black/African American	31%	35%
Hispanic/Latinx	34%	39%
Native American/Alaska Native	30%	35%
Native Hawaiian/Pacific Islander	30%	34%
Two or more	32%	37%
White	29%	33%
Not reported	32%	37%

Appendix B Table 9: Percentage of students facing unaffordable costs at community colleges by EFC level and gender.

Fall 2018 - Fall 2019	OOG	Non-OOG/Pell	Non-OOG/Non-Pell
Female	50%	32%	22%
Male	53%	39%	24%
Not reported	65%	42%	23%

Appendix B Table 10: Percentage of students facing unaffordable costs at community colleges by EFC level and rural/urban status.

Fall 2018 - Fall 2019	OOG	Non-OOG/Pell	Non-OOG/Non-Pell
Rural	47%	32%	22%
Urban	52%	36%	23%

Appendix B Table 11: Percentage of students facing unaffordable costs at community colleges by EFC level and age.

Fall 2018 - Fall 2019	OOG	Non-OOG/Pell	Non-OOG/Non-Pell
18-24	55%	38%	21%
25+	43%	32%	25%

APPENDIX C. OUTCOME MEASURES BY STUDENT CHARACTERISTICS

OVERALL OUTCOME MEASURES BY STUDENT CHARACTERISTICS

Appendix C Table 1: Percentage of new students in fall 2018 who returned to school in fall 2019 (retention rate), by sector and EFC level.

Public Universities			Community Colleges			Private, Nonprofit Institutions		
OOG	Non-OOG + Pell	Non-OOG, Non-Pell	OOG	Non-OOG + Pell	Non-OOG, Non-Pell	OOG	Non-OOG + Pell	Non-OOG, Non-Pell
83.0%	77.5%	87.6%	79.6%	76.7%	80.6%	66.3%	61.6%	64.7%

Appendix C Table 2: Percentage of first-time freshmen at public universities and private institutions in 2013-14 who earned a bachelor's degree within six years and percentage of new community college students in 2015-16 who earned a certificate or degree or transferred to a four-year institution within four years (completion rate), by sector and EFC level.

Public Universities			Community Colleges			Private, Nonprofit Institutions		
OOG	Non-OOG + Pell	Non-OOG, Non-Pell	OOG	Non-OOG + Pell	Non-OOG, Non-Pell	OOG	Non-OOG + Pell	Non-OOG, Non-Pell
63.4%	46.7%	72.5%	48.4%	44.6%	57.6%	81.6%	86.2%	75.1%

Appendix C Table 3: Years to completing a bachelor's degree at public universities and an associate degree at community colleges for 2018-19 graduates, by sector and EFC level.

Year of completion	Public Universities			Community Colleges		
	OOG	Non-OOG + Pell	Non-OOG, Non-Pell	OOG	Non-OOG + Pell	Non-OOG, Non-Pell
2018-19	4.2	4.7	3.7	3.8	3.8	2.8

PUBLIC UNIVERSITIES: RETENTION

Appendix C Table 4: Percentage of new public university freshmen in fall 2018 who returned to school in fall 2019 (retention rate), by race/ethnicity and EFC level.

Fall 2018 - Fall 2019	OOG	Non-OOG + Pell	Non-OOG, Non-Pell
Asian American	93.1%	91.8%	92.6%
Black/African American	81.5%	80.0%	84.2%
Hispanic/Latinx	84.5%	77.7%	83.0%
Native American/Alaska Native	50.0%	53.8%	72.2%
Native Hawaiian/Pacific Islander	75.0%	50.0%	92.9%
Two or more	77.9%	75.0%	88.5%
White	81.3%	76.8%	87.5%
Not Reported	81.7%	76.5%	90.2%

Appendix C Table 5: Percentage of new public university freshmen in fall 2018 who returned to school in fall 2019 (retention rate), by gender and EFC level.

Fall 2018 - Fall 2019	OOG	Non-OOG + Pell	Non-OOG, Non-Pell
Female	84%	78%	87%
Male	82%	76%	87%
Not reported	72%	100%	100%

Appendix C Table 6: Percentage of new public university freshmen in fall 2018 who returned to school in fall 2019 (retention rate), by geographic origin and EFC level.

Fall 2018 - Fall 2019	OOG	Non-OOG + Pell	Non-OOG, Non-Pell
Rural	80%	71%	84%
Urban	84%	79%	88%

Appendix C Table 7: Percentage of new public university freshmen in fall 2018 who returned to school in fall 2019 (retention rate), by age group and EFC level.

Fall 2018 - Fall 2019	OOG	Non-OOG + Pell	Non-OOG, Non-Pell
<18	82.3%	78.0%	89.4%
18-24	83.3%	77.2%	87.2%
25+	70.0%	85.7%	83.3%

PUBLIC UNIVERSITIES: COMPLETION

Appendix C Table 8: Percentage of first-time freshmen at public universities who earned a bachelor's degree within six years, by race/ethnicity and EFC level.

2013 Freshmen Cohort	OOG	Non-OOG/Pell	Non-OOG/Non-Pell
Asian American	75.2%	52.8%	81.2%
Black/African American	51.0%	42.1%	53.8%
Hispanic/Latinx	61.5%	41.6%	68.8%
Native American/Alaska Native	60.0%	25.0%	52.6%
Native Hawaiian/Pacific Islander	54.5%	100.0%	63.6%
Two or more	60.7%	49.1%	75.0%
White	63.4%	47.8%	72.3%
Not Reported	54.3%	34.8%	76.5%

Appendix C Table 9: Percentage of first-time freshmen at public universities who earned a bachelor's degree within six years, by gender and EFC level.

2013 Freshmen Cohort	OOG	Non-OOG/Pell	Non-OOG/Non-Pell
Female	66.2%	50.0%	75.0%
Male	59.5%	43.3%	69.6%
Not reported	50.0%	0.0%	0.0%

Appendix C Table 10: Percentage of first-time freshmen at public universities who earned a bachelor's degree within six years, by geographic origin and EFC level.

2013 Cohort	OOG	Non-OOG/Pell	Non-OOG/Non-Pell
Rural	58.3%	33.9%	66.0%
Urban	64.3%	48.7%	73.5%

Appendix C Table 11: Percentage of first-time freshmen at public universities who earned a bachelor's degree within six years, by age and EFC level.

2013 Cohort	OOG	Non-OOG/Pell	Non-OOG/Non-Pell
<18	63.6%	52.5%	77.3%
18-24	63.7%	48.0%	71.6%
25+	32.3%	10.8%	40.0%

PUBLIC UNIVERSITIES – TIME TO DEGREE

Appendix C Table 12: Years to completing a bachelor’s degree at public universities for 2018-19 graduates, by race/ethnicity and EFC level.

2018-19	OOG	Non-OOG/Pell	Non-OOG/Non-Pell
Asian American	4.0	4.0	3.7
Black/African American	4.2	N/A	4.0
Hispanic/Latinx	4.0	4.6	4.0
Native American/Alaska Native	4.7	N/A	4.0
Native Hawaiian/Pacific Islander	4.7	N/A	4.0
Two or more	4.0	5.0	3.7
White	4.0	4.5	3.7
Not reported	4.0	N/A	4.2

Appendix C Table 13: Years to completing a bachelor’s degree at public universities for 2018-19 graduates, by gender and EFC level.

2018-19	OOG	Non-OOG/Pell	Non-OOG/Non-Pell
Female	3.7	4.2	3.7
Male	4.5	4.7	4.0
Not reported	3.7	N/A	4.2

Appendix C Table 14: Years to completing a bachelor’s degree at public universities for 2018-19 graduates, by geographic origin and EFC level.

2018-19	OOG	Non-OOG/Pell	Non-OOG/Non-Pell
Rural	4.0	4.7	3.7
Urban	4.0	4.5	3.7

Appendix C Table 15: Years to completing a bachelor’s degree at public universities for 2018-19 graduates, by age and EFC level.

2018-19	OOG	Non-OOG/Pell	Non-OOG/Non-Pell
<18	4.0	4.7	3.7
18-24	4.0	4.5	3.7
25+	4.7	7.0	N/A

COMMUNITY COLLEGES – RETENTION

Appendix C Table 16: Percentage of new, credential-seeking community college students in fall 2018 who returned to school in fall 2019 (retention rate), by race/ethnicity and EFC level.

Fall 2018 - Fall 2019	OOG	Non-OOG/Pell	Non-OOG/Non-Pell
Asian American	83.1%	80.4%	79.2%
Black/African American	76.1%	77.6%	71.9%
Hispanic/Latinx	82.2%	76.9%	80.5%
Native American/Alaska Native	69.8%	75.0%	77.8%
Native Hawaiian/Pacific Islander	82.4%	65.2%	69.6%
Two or more	77.6%	69.4%	79.2%
White	79.1%	77.5%	81.2%
Not reported	76.1%	76.2%	79.1%

Appendix C Table 17: Percentage of new, credential-seeking community college students in fall 2018 who returned to school in fall 2019 (retention rate), by gender and EFC level.

Fall 2018 - Fall 2019	OOG	Non-OOG/Pell	Non-OOG/Non-Pell
Female	78.8%	77.9%	81.5%
Male	80.5%	75.7%	79.8%
Not reported	84.8%	68.6%	72.2%

Appendix C Table 18: Percentage of new, credential-seeking community college students in fall 2018 who returned to school in fall 2019 (retention rate), by geographic origin and EFC level.

Fall 2018 - Fall 2019	OOG	Non-OOG/Pell	Non-OOG/Non-Pell
Rural	76.0%	75.5%	81.5%
Urban	82.5%	77.5%	82.7%
Unknown	80.1%	77.0%	80.1%

Appendix C Table 19: Percentage of new, credential-seeking community college students in fall 2018 who returned to school in fall 2019 (retention rate), by age and EFC level.

Fall 2018 - Fall 2019	OOG	Non-OOG/Pell	Non-OOG/Non-Pell
<18	80.5%	72.2%	79.5%
18-24	80.3%	75.3%	81.8%
25+	75.6%	80.2%	72.5%

COMMUNITY COLLEGES – COMPLETION

Appendix C Table 20: Percentage of new, credential-seeking community college students in 2015-16 who earned a certificate or degree or transferred to a four-year institution within four years (completion rate), by race/ethnicity and EFC level.

2015 cohort	OOG	Non-OOG/Pell	Non-OOG/Non-Pell
Asian American	47.5%	45.8%	59.5%
Black/African American	34.1%	33.3%	40.4%
Hispanic/Latinx	48.7%	40.2%	48.2%
Native American/Alaska Native	46.8%	62.2%	58.5%
Native Hawaiian/Pacific Islander	33.3%	12.5%	47.1%
Two or more	42.5%	45.4%	55.4%
White	49.9%	46.1%	60.0%
Not reported	46.0%	43.2%	52.1%

Appendix C Table 21: Percentage of new, credential-seeking community college students in 2015-16 who earned a certificate or degree or transferred to a four-year institution within four years (completion rate), by gender and EFC level.

2015 cohort	OOG	Non-OOG/Pell	Non-OOG/Non-Pell
Female	48.7%	44.7%	60.2%
Male	47.9%	44.4%	54.6%
Not reported	43.8%	46.7%	53.3%

Appendix C Table 22: Percentage of new, credential-seeking community college students in 2015-16 who earned a certificate or degree or transferred to a four-year institution within four years (completion rate), by geographic origin and EFC level.

2015 cohort	OOG	Non-OOG/Pell	Non-OOG/Non-Pell
Rural	53.3%	48.1%	62.6%
Urban	48.7%	45.4%	60.6%
Unknown	46.9%	43.5%	56.1%

Appendix C Table 23: Percentage of new, credential-seeking community college students in 2015-16 who earned a certificate or degree or transferred to a four-year institution within four years (completion rate), by age and EFC level.

2015 cohort	OOG	Non-OOG/Pell	Non-OOG/Non-Pell
<18	46.7%	48.7%	57.3%
18-24	48.2%	43.9%	57.7%
25+	49.6%	45.4%	57.5%

COMMUNITY COLLEGES – TIME TO DEGREE

Appendix C Table 24: Years to completing an associate degree at community colleges for 2018-19 graduates, by race/ethnicity and EFC level.

2018-19	OOG	Non-OOG/Pell	Non-OOG/Non-Pell
Asian American	3.3	3.8	2.8
Black/African American	4.8	4.3	3.5
Hispanic/Latinx	3.0	3.5	2.8
Native American/Alaska Native	4.0	5.3	3.8
Native Hawaiian/Pacific Islander	N/A	4.2	2.5
Two or more	3.8	3.8	2.8
White	4.0	4.0	2.8
Not reported	3.3	2.8	2.5

Appendix C Table 25: Years to completing an associate degree at community colleges for 2018-19 graduates, by gender and EFC level.

2018-19	OOG	Non-OOG/Pell	Non-OOG/Non-Pell
Female	3.8	3.5	2.8
Male	3.5	3.3	2.8
Not reported	3.0	2.2	2.5

Appendix C Table 26: Years to completing an associate degree at community colleges for 2018-19 graduates, by geographic origin and EFC level.

2018-19	OOG	Non-OOG/Pell	Non-OOG/Non-Pell
Rural	3.5	3.3	2.3
Urban	3.8	3.8	2.8
Unknown	5.3	4.8	3.3

Appendix C Table 27: Years to completing an associate degree at community colleges for 2018-19 graduates, by age and EFC level.

2018-19	OOG	Non-OOG/Pell	Non-OOG/Non-Pell
18-24	2.8	2.8	2.5
25+	5.3	5.5	4.8

PRIVATE, NONPROFIT INSTITUTIONS: RETENTION

Appendix C Table 28: Percentage of first-time freshmen at private, nonprofit institutions in fall 2017 who returned to school in fall 2018 (retention rate), by race/ethnicity and EFC level.

Fall 2017 - Fall 2018	OOG	Non-OOG/Pell	Non-OOG/Non-Pell
Asian American	87%	N/A	80%
Black/African American	N/A	N/A	N/A
Hispanic/Latinx	69%	N/A	90%
Native American/Alaska Native	N/A	N/A	N/A
Native Hawaiian/Pacific Islander	N/A	N/A	N/A
Two or more	N/A	N/A	N/A
White	78%	78%	83%
Not reported	59%	N/A	N/A

Appendix C Table 29: Percentage of first-time freshmen at private, nonprofit institutions in fall 2017 who returned to school in fall 2018 (retention rate), by gender and EFC level.

Fall 2017 - Fall 2018	OOG	Non-OOG/Pell	Non-OOG/Non-Pell
Female	69%	75%	81%
Male	84%	70%	88%
Not reported	N/A	N/A	N/A

Appendix C Table 30: Percentage of first-time freshmen at private, nonprofit institutions in fall 2017 who returned to school in fall 2018 (retention rate), by geographic origin and EFC level.

Fall 2017 - Fall 2018	OOG	Non-OOG/Pell	Non-OOG/Non-Pell
Rural	86%	N/A	85%
Urban	82%	74%	88%
Unknown	62%	N/A	N/A

Appendix C Table 31: Percentage of first-time freshmen at private, nonprofit institutions in fall 2017 who returned to school in fall 2018 (retention rate), by age and EFC level.

Fall 2017 - Fall 2018	OOG	Non-OOG/Pell	Non-OOG/Non-Pell
18-24	82%	78%	85%
25+	48%	N/A	68%

PRIVATE, NONPROFIT INSTITUTIONS: COMPLETION

Appendix C Table 32: Percentage of first-time freshmen at private, non-profit institutions who earned a bachelor's degree within six years, by race/ethnicity and EFC level.

2013 cohort	OOG	Non-OOG/Pell	Non-OOG/Non-Pell
Asian American	82%	N/A	91%
Black/African American	N/A	N/A	46%
Hispanic/Latinx	83%	84%	78%
Native American/Alaska Native	N/A	N/A	90%
Native Hawaiian/Pacific Islander	N/A	N/A	N/A
Two or more	88%	70%	83%
White	81%	79%	74%
Not reported	77%	N.A	76%

Appendix C Table 33: Percentage of first-time freshmen at private, non-profit institutions who earned a bachelor's degree within six years, by gender and EFC level.

2013 cohort	OOG	Non-OOG/Pell	Non-OOG/Non-Pell
Female	82%	77%	78%
Male	80%	78%	71%

Appendix C Table 34: Percentage of first-time freshmen at private, non-profit institutions who earned a bachelor's degree within six years, by geographic origin and EFC level.

2013 cohort	OOG	Non-OOG/Pell	Non-OOG/Non-Pell
Rural	85%	N/A	79%
Urban	85%	70%	73%
Not reported	76%	81%	85%

Appendix C Table 35: Percentage of first-time freshmen at private, non-profit institutions who earned a bachelor's degree within six years, by age and EFC level.

2013 cohort	OOG	Non-OOG/Pell	Non-OOG/Non-Pell
18-24	82%	78%	77%
25+	N/A	N/A	60%

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