

ANNUAL EVALUATION OF THE
OREGON OPPORTUNITY GRANT,
ORS 348.205



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PREFACE

The Oregon Opportunity Grant (OOG) is the state's largest need-based financial aid program, helping students pursue higher education at colleges and universities across Oregon. Since its inception in 1971, the program has supported hundreds of thousands of students in continuing their education. Over the years, the OOG has evolved, with changes in eligibility criteria, funding amounts, and allocation processes.

In 2015, House Bill 2407 provided guidance on how the Higher Education Coordinating Commission (HECC), which oversees the program, should prioritize grant awards for students with the greatest financial need when funds are insufficient to cover all eligible applicants. The legislation also mandated that the HECC submit an annual evaluative report on the program, beginning in February 2020. This fourth annual report presents findings from the HECC's analysis of student academic success and performance among OOG recipients.

The report was prepared by HECC's Office of Research and Data in collaboration with the Office of Student Access and Completion (OSAC), which administers the grant. As the state agency responsible for coordinating postsecondary education in Oregon, the HECC develops policies, oversees funding distribution, and partners with institutions across public and private sectors to support student success. The agency administers more than \$2 billion annually in state funding for higher education.

For more information about the HECC, visit www.oregon.gov/highered, and for details on student financial aid programs, visit www.oregonstudentaid.gov. General inquiries about the HECC can be directed to info.HECC@hecc.oregon.gov, while questions about this report should be addressed to Amy Cox, Director of the Office of Research and Data, at amy.cox@hecc.oregon.gov.

TABLE OF CONTENTS

PREFACE.....	II
LIST OF TABLES.....	IV
LIST OF FIGURES	V
EXECUTIVE SUMMARY.....	VI
ACKNOWLEDGEMENTS	X
ABBREVIATIONS	XI
CHAPTER 1. INTRODUCTION.....	1
CHAPTER 2. FINDINGS.....	7
CHAPTER 3. CONCLUSION.....	18
REFERENCES	20
APPENDIX A. OREGON OPPORTUNITY GRANT AWARDING CRITERIA AND AMOUNTS	21
APPENDIX B. AFFORDABILITY RATE BY STUDENT CHARACTERISTICS.	23

LIST OF TABLES

Table 2.1. Characteristics of students with Oregon Opportunity Grant (OOG), students with an EFC above the OOG threshold, and all credential-seeking students, fall term 2022-23.	8
Table 2.2. Characteristics of students with Oregon Opportunity Grant (OOG) and Pell Grant between 2016-17 and 2020-21 and students with OOG in 2021-22 and 2022-23.	9
Table 2.3. Estimated percentage of students who could not meet cost of attendance with expected resources, by sector and income level, 2022-23.	11
Table 2.4. Estimated percentage of students who would not meet cost of attendance with expected resources, by sector, income level, and OOG, 2022-23.	12
Table 2.5. Percentage of new students enrolled in fall term who continued to winter term and to spring term and percentage enrolled in fall 2022 who were also enrolled in fall 2023, by sector and OOG status, 2022-23.	14
Table 2.6. Average number of credits earned by students in 2022-23, by OOG status and educational sector.	15
Table 2.7. Percentage of new students enrolled in fall term who continued to winter term and to spring term and percentage enrolled in fall 2021 who were also enrolled in fall 2022, among students with Pell Grants and students with OOG between 2016-17 and 2020-21 and students with OOG in 2021-22 and 2022-23.	16
Table 2.8. Number of credits earned by students in 2021-22 and 2022-23, by OOG status and educational sector.	16
Table A.1. Average annual cost of attendance by sector and thresholds for receiving federal Pell Grants and OOG awards, 2012-13 through 2022-23.	21
Table A.2. Average OOG disbursement amounts, by sector, 2012-13 to 2022-23.	21
Table A.3. Annual maximum OOG award amounts by sector from 2012-13 to 2023-24.	22
Table B.1. Estimated percentage of students facing unaffordable costs, by student characteristic and sector, 2022-23.	23

LIST OF FIGURES

Figure 2.1. Number of students receiving Oregon Opportunity Grant, by year and educational sector, 2015-16 through 2022-23.	7
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EXECUTIVE SUMMARY

BACKGROUND

The Oregon Opportunity Grant (OOG) is the state's largest need-based, state-funded financial aid program aimed at increasing access to higher education for Oregon students. Established in 1971, it has supported hundreds of thousands of students pursuing college and university degrees, evolving over time in terms of funding distribution, award amounts, and eligibility criteria. A significant legislative change occurred in 2015 with House Bill (HB) 2407, which instructed the Higher Education Coordinating Commission (HECC) to prioritize grant awards when funding is limited and mandated the production of an annual report assessing the program's impact on recipients' academic success. This document serves as the fifth annual report, detailing the OOG's implementation and outcomes for the 2022-23 academic year. The report offers an overview of the 30,000 to 40,000 grant recipients each year and evaluates the impact of the OOG on affordability and OOG students' academic performance.

The eligibility criteria and award amounts for the OOG have adapted over time to reflect changes in funding, legislative priorities, and education policies. Currently, eligible undergraduate students can receive grants for up to four years (12 trimesters or eight semesters), with prorated awards for part-time enrollment. Key eligibility requirements include being a U.S. citizen or eligible noncitizen, an Oregon resident for at least 12 months, submitting a Free Application for Federal Student Aid (FAFSA) or Oregon Student Aid Application (ORSAA), demonstrating financial need, and enrolling in a degree program, except for theology or religious studies. Students must also maintain satisfactory academic progress and submit a FAFSA or ORSAA annually by May 1 for continued funding.

The HECC's Office of Student Access and Completion (OSAC) determines financial need using the federally calculated expected family contribution (EFC, replaced in 2024 by the Student Aid Index). It awards grants based on students' EFCs, starting with EFCs of \$0 and continuing with higher EFC levels until available funds are exhausted. For the 2022-23 academic year, the Expected Family Contribution (EFC) limit was raised to \$8,000, enabling students with an EFC of \$8,000 or less to qualify, marking the second year in which the OOG's EFC limit surpassed that of the federal Pell Grant, which was \$6,206 in 2022-23.

Previous reports have assessed the impact of the OOG program on student success and college/university affordability. Findings consistently show that students with the grant are more diverse and have similar or better academic outcomes than other low-income students and their higher-income peers.

REPORT

This report assesses the impact of the OOG on student academic success, performance, and affordability, particularly considering the increased EFC limit. The report addresses three main questions:

1. Who are the students awarded an OOG?
2. What is the financial impact of the OOG on postsecondary affordability?
3. What is the academic success and performance of students who received an OOG?

Utilizing student records from colleges and FAFSA/ORSA data, the report compares OOG recipients with students from different financial backgrounds and aid statuses to assess the grant's influence as eligibility expanded. The analysis measures academic progress with term-to-term retention rates for new students and credits earned, due to insufficient data for long-term graduation analyses (the policy changes began in the same year being analyzed). Previous reports indicated that examined graduation and found that the OOG is associated correlates with higher retention and graduation rates. Overall, this descriptive report provides insight into the OOG's effectiveness, while recognizing that factors influencing student outcomes may be interconnected or affected by external circumstances.

FINDINGS

In the 2022-23 academic year, students who received the Oregon Opportunity Grant (OOG) were notably more likely to come from marginalized backgrounds than their peers, with 45 percent identifying as students of color, 33 percent being 25 or older, 62 percent as women, and 15 percent from rural counties, compared to lower percentages among students with higher EFCs. OOG recipients in 2022-23 were slightly more likely to identify as Latino/a/x/Hispanic, while maintaining similarities to previous low-income students (i.e., Pell Grant and OOG recipients). Overall, despite the raised eligibility threshold, the OOG program continues to effectively support students who are underrepresented in college and university.

The 2022-23 academic year marked the first year of increased funding for the Oregon Opportunity Grant (OOG) following the higher EFC eligibility established in 2021-22. The effects of these two changes reflect the enhanced affordability the OOG provided during these years. In 2020-21, the overall affordability rate was 40 percent (indicating that 40 percent of students faced unaffordable costs), which would have risen to 43 percent without the OOG. By 2022-23, this impact had increased from a three-percentage-point difference to a five-percentage-point difference, with the overall rate at 36 percent, compared to 41 percent without the OOG. The improvement in affordability was even more significant for low-income students as the program enhanced affordability by 10 percentage points in 2020-21, and improved it by 13 percentage points in 2022-23.

In the 2022-23 academic year, new students receiving the Oregon Opportunity Grant (OOG) demonstrated retention rates comparable to their higher income peers, with OOG recipients at

community colleges showing higher retention than other students, while those at public universities and private non-profit institutions had similar rates to their peers. Additionally, OOG community college recipients earned more credits than their community college counterparts in 2022-23, with credit accumulation at public universities and private institutions being nearly identical. An analysis of new students in 2022-23 found that 82 percent of new students awarded OOG were retained from fall to winter at community colleges, surpassing retention rates of past Pell Grant recipients, while at public universities, their rates were slightly higher than both previous Pell and OOG recipients. In private institutions, OOG recipients had similar retention rates to Pell Grant recipients but lower than earlier OOG recipients. The data suggests that the increased EFC eligibility for the OOG did not significantly affect retention rates. Furthermore, comparisons of credits earned between OOG recipients in 2021-22 and 2022-23 and previous student groups indicated minimal differences, except for Pell Grant recipients without an OOG in earlier years.

IMPLICATIONS

This report examined the characteristics of students served by the OOG, the impact of the OOG on college/university affordability, and the academic success of the students who have the grant. The results depict a program that serves students who are underrepresented in college and university, eases its high cost, and is characterized by the academic success of its participants. The fact that outcomes for lower income students are repeatedly higher than or similar to the outcomes for higher income students is remarkable. Lower income students are more often first-generation college students and face a range of hurdles in pursuing college and university success. Moreover, these results are consistent with those of earlier evaluations of the program, across different measures of academic performance, multiple comparison groups, rising eligibility thresholds, different grant sizes, and multiple years. This is a notably consistent set of positive outcomes for a single program.

These results are also consistent with national research that demonstrates the positive impact on student success of public grants, especially state financial aid grants. The program changes for grant recipients in 2022-23 made this state support available to new groups of students. For the second year in a row, students from low-income families were able to combine the OOG with the federal Pell Grant to make college and university more possible than ever before. In addition, the OOG became available for many more students whose EFC was just above the Pell Grant limit, making the state support shown to improve academic success now available to a greater share of Oregon college and university students.

The impact of these outcomes extends beyond students' college and university careers. Higher retention and progression lead to higher graduation, and postsecondary degrees open the door to greater economic and social stability for individuals, families, and the state. Individuals with postsecondary degrees not only earn more, but they also tend to be less affected by economic downturns, and they contribute more tax revenue to Oregon's General Fund. Filling the projected need for Oregon workers with postsecondary credentials requires drawing underrepresented groups

into college and university and ensuring their graduation. The positive outcomes of the OOG shown here contribute to this state need.

The positive outcomes from the most recent program expansion, the repetition of positive outcomes across measures, groups, and years, and the need for more workers with postsecondary degrees point to sustaining and broadening the Oregon Opportunity Grant program. We recommend the program continue to be expanded and advanced.

ACKNOWLEDGEMENTS

This report would not have been possible without the efforts of many individuals. We extend our sincere gratitude to the staff in the HECC Office of Student Access and Completion for their dedication to administering the Oregon Opportunity Grant and their valuable contributions to this report. We also appreciate our institutional partners, who support Oregon's students applying for and receiving the grant plays a crucial role in its success. Most importantly, we thank the students who make progress toward their education goals despite the many challenges they face.

ABBREVIATIONS

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 at the Higher Education Coordinating Commission
SAI	Student Aid Index

CHAPTER 1. INTRODUCTION

BACKGROUND

The Oregon Opportunity Grant (OOG) is the state's largest need-based, state-funded financial aid program, designed to help Oregon students access higher education. Since its inception in 1971, the program has provided critical financial support to hundreds of thousands of students pursuing college and university degrees. Over time, the OOG has evolved, with changes to funding distribution, award amounts, and eligibility criteria. A key development came in 2015 with the passage of House Bill (HB) 2407, which established guidelines for the Higher Education Coordinating Commission (HECC) to prioritize grant awards when available funds are insufficient to serve all eligible students. Additionally, the legislation requires the HECC to produce an annual report evaluating the impact of the OOG on recipients' academic success. This document marks the fifth annual report, highlighting the program's implementation and outcomes during the 2022-23 academic year.

The OOG is designed to make postsecondary education more affordable for Oregon residents. To apply, students need to complete either the Free Application for Federal Student Aid (FAFSA) or the Oregon Student Aid Application (ORSAA). Each year, the HECC Office of Student Access and Completion (OSAC) processes FAFSA/ORSAA applications for approximately 200,000 undergraduate students who may qualify for the grant. From this group, 30,000 to 40,000 students typically receive awards annually. This report provides an overview of these recipients and examines their academic success.

THE PROGRAM

Eligibility for the Oregon Opportunity Grant

The eligibility criteria and award amounts for the OOG have evolved over time in response to shifts in funding levels, legislative priorities, and postsecondary education policies. Currently, eligible students may receive grants for up to four years (12 trimesters or eight semesters) of full-time enrollment, with prorated awards available for students enrolled part-time or for a portion of the academic year. 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 students, including students with Deferred Action for Childhood Arrivals status, may be eligible if they meet certain additional requirements.

- Be enrolled at last half time (6 credit-hours/term or more).
- Attend a participating Oregon postsecondary institution (i.e., one that 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 the institution's cost of attendance and the federal aid and financial resources of the student and the student's family, if applicable.
- Be enrolled in a course of study other than theology, divinity, or religious education.

To remain eligible for the OOG, students must make satisfactory academic progress as determined by their institution, have no defaults on federal student loans, owe no refunds on federal student grants, and meet all federal Title IV eligibility requirements.

For a guaranteed second-year award, students must meet all standard eligibility criteria, be a first-time recipient, enroll at least half-time, and submit a FAFSA or ORSAA for the upcoming academic year by May 1. A new FAFSA or ORSAA must be submitted each academic year to continue receiving the grant.

Before the 2021-22 academic year, students were required to be enrolled at least half-time during the fall term to qualify for the OOG. However, beginning in fall 2021, increased funding allowed OSAC to waive this requirement, enabling students to maintain eligibility by enrolling at least half-time in any single term. This waiver is reviewed each academic term to determine its continuation.

Awarding Procedures and Amounts

OSAC determines financial need using the federally calculated Expected Family Contribution (EFC) and awards grants based on students' EFCs, starting with those who have an EFC of \$0 and continuing with higher EFC levels until available funds are exhausted.¹ In 2024, the U.S. Department of Education changed the calculation and description of family contributions to a student's education. This change will replace the Expected Family Contribution (EFC) with the Student Aid Index (SAI) and aims to provide a clearer and more accurate assessment of a student's financial situation and eligibility for aid. These changes were implemented in the FAFSA for the 2024-25 academic year and are not part of this report.

For the 2022-23 academic year, the EFC eligibility for the OOG was set at \$8,000, meaning students with an EFC of \$8,000 or less qualified for the grant. This limit was significantly higher than in years previous to 2021-22 due to increased program funding and lower overall enrollment. In the five years

¹ Because available funds and the number of students at different EFC levels vary each year, OSAC specifies the OOG EFC limit relatively close to the academic year. Similarly, OSAC is not able to predict the final deadline for submitting a FAFSA/ORSAA to receive a grant before funds are exhausted. Even when students received the OOG in prior years and filed the FAFSA early, they may not receive a grant in the next year, especially if their EFC is above the limit.

prior to 2021-22, the EFC limit for the OOG had been \$3,500. In 2021-22, the OOG EFC eligibility limit rose to \$6,000. That year, for the first time in program history, the 2021-22 OOG EFC limit exceeded that of the federal Pell Grant, which was \$5,846 that year. With continued funding expansion, the EFC limit increased again for the 2022-23 academic year, reaching \$8,000—once again surpassing the Pell Grant EFC limit, which was \$6,206 that year.

In 2022-23, not only did the OOG become available to a broader range of students through the higher EFC limit, but it also became larger in size. In 2021-22, the award for a full-time student was \$2,778 for enrollment at a community college and \$3,612 for enrollment at a public university or private degree-granting institution. These award sizes grew by 30 percent for 2022-23, to \$3,600 at a community college and \$4,692 at a public university or private institution.

PRIOR FINDINGS

Previous reports analyze the impact of the OOG program using student records from colleges and universities and FAFSA/ORSA data. These sources provide insights into student characteristics, enrollment, financial aid distribution, and academic performance. The studies compare OOG recipients in the year being analyzed with higher-income students, students who did not apply for aid, and past grant recipients to assess the program's effects on affordability and academic success.

From the most recent report, the Oregon Opportunity Grant (OOG) provided financial assistance in 2021-22 to nearly 36,000 Oregon students, many of whom came from marginalized communities beyond low-income communities. While OOG recipients were still more likely than higher-income students to struggle with college costs, the grant significantly improved affordability. An estimated 12.5% of recipients were estimated to be able to meet the total cost of attendance at their institution. The expansion of the OOG that year, alongside lower enrollment and pandemic-related factors, contributed to the greatest improvement in affordability seen in the past decade.²

Beyond financial support, OOG recipients demonstrated strong academic success in all previous reports. For example, the most recent report found that students in 2021-22 performed as well as or better than their peers across multiple measures. Community college recipients had higher fall-to-winter and fall-to-spring retention rates than other students, while public university and private institution recipients showed retention rates nearly identical to those of higher-income students and the overall student population. Additionally, OOG recipients earned the same or more credits compared to both higher-income students and past OOG recipients, indicating that academic performance remained stable with expanded program eligibility.

Prior reports also looked at graduation rates and found that OOG recipients were consistently as likely or more likely to graduate than other low-income students without the grant and higher income

² Higher Education Coordinating Commission. (2024). Report to the Oregon Legislature: Oregon Opportunity Grant Annual Evaluation, 2023. <https://www.oregon.gov/highered/strategy-research/Documents/Reports/2023-Annual-Evaluation-Oregon-Opportunity-Grant-ORS%20348.205.pdf>.

students. These findings echoed national research that showed that state financial grants led to higher graduation rates among college students.

The findings of prior evaluations of the OOG affirm the program’s effectiveness in supporting students from marginalized communities by improving both affordability and academic outcomes. Nevertheless, and despite the expansion of funding and eligibility, half of OOG recipients in 2021-22 still faced unaffordable college costs, indicating the need for larger grant awards. Ultimately, this report highlights the critical role of the OOG in helping Oregon students succeed in higher education, particularly during the ongoing challenges of the COVID-19 pandemic.

Beyond evaluations of the OOG, other related literature document the numerous interconnected challenges that students from low-income backgrounds face and that make college enrollment and completion more difficult. Even with public grants, financial obstacles persist, as these funds typically cover only a portion of college or university costs. Many students must also balance their education with the need to support their families financially. Additionally, low-income students are more likely to be the first in their families to pursue higher education, which introduces further challenges, such as limited access to college preparation resources, difficulty navigating academic requirements and deadlines, and cultural barriers associated with higher education. These students may also struggle with securing essential resources like study materials, technology, health insurance, and mentorship. For many OOG recipients, these challenges are compounded by additional barriers, including discrimination and cultural prejudices faced by students of color and those from rural communities.³

CONTENT OF REPORT

Main Questions

HB 2407 (2015) not only prioritizes awarding grants to students from the lowest-income backgrounds but also requires the HECC to submit an annual evaluative report on the OOG to the Legislature. This fourth annual report examines the OOG’s impact on student academic success, performance, and affordability, with a particular focus on the effects of the increased EFC limit and award size. It focuses on the 2022-23 academic year.

Specifically, the report answers the following questions:

1. Who are the students awarded an OOG?
2. What is the financial impact of the OOG on postsecondary affordability?

³ Balzer Carr, B., & London, R. A. (2020). Healthy, Housed, and Well-Fed: Exploring Basic Needs Support Programming in the Context of University Student Success. American Educational Research Association, 6(4), 233285842097261. Sage Publications. <https://doi.org/10.1177/2332858420972619>.

⁴ Continued: Broton, K., & Frank, V. (2014, October). Safety, Security, and College Attainment: An Investigation of Undergraduates’ Basic Needs and Institutional Response. Association for Public Policy and Management. Engle, J., & Tinto, V. (2008). Moving Beyond Access: College Success for Low-Income Students. The Pell Institute for the Study of Opportunity in Higher Education. <https://files.eric.ed.gov/fulltext/ED504448.pdf>.

3. What is the academic success and performance of students who received an OOG?

The answers to these questions we provide an overview of the current state of the OOG program. However, it is important to note that this report is descriptive in nature. The variables examined may be interrelated or influenced by external factors, and causal relationships between variables have not been explored.

Data and Methods

To address these questions, we rely on two main data sources: student records submitted to the HECC by colleges and universities, and FAFSA/ORSAA records submitted by students applying for aid. The student record data includes administrative details about student characteristics, enrollment, and degree program completion, while the FAFSA/ORSAA data covers grant disbursements, student characteristics, expected family contributions (EFCs), and other financial aid-related information.

A key element in evaluating the OOG is comparing the outcomes of OOG recipients with those of different student groups. Ideally, we would compare OOG recipients with students who have the same income level, academic background, and first-generation status but who do not receive the OOG. However, identifying such students is challenging. Previous reports compared OOG recipients with students from low-income backgrounds who had EFCs just above the OOG eligibility limit but were still eligible for the federal Pell Grant. While not identical to OOG recipients, these students likely faced similar challenges, such as often being first-generation college students. This comparison was possible when the OOG's EFC eligibility threshold was much lower than the Pell Grant threshold.

In 2021-22, the EFC limit for the OOG increased, making it nearly the same as the Pell Grant EFC limit. In 2022-23, the OOG EFC limit increased further, again surpassing the Pell Grant EFC limit. Therefore, in this report, we compare 2022-23 OOG recipients with other students enrolled in the same year and with students who received aid in previous years. This comparison allows us to assess the OOG's impact on students in 2022-23 and examine the effects of the program's expanded eligibility and expanded grant size. We compare OOG recipients to students with EFCs above the OOG threshold (i.e., those from middle- and upper-income backgrounds) and to all students enrolled, regardless of whether they filed a FAFSA/ORSAA. The latter group includes students from diverse financial backgrounds and credit loads. To explore the impact of the EFC and grant size changes, we also compare 2021-22 and 2022-23 OOG recipients with those from 2016-17 through 2020-21 who received the OOG or a Pell Grant.

We evaluate the financial impact of the program using a student affordability index, comparing how the OOG affects the number of students facing unaffordable costs and how this impact shifted with the higher EFC eligibility.

We define student success and performance through retention rates and the number of credits earned. Prior reports have shown that the OOG is linked to higher second-year retention and higher

graduation rates among recipients compared to peers with slightly higher incomes. Like the 2023 report, this year's report builds on prior findings by examining term-to-term retention among new students and average credits earned for all students. Because the OOG eligibility and grant size both expanded in both 2021-22 and 2022-23, only two years of data are available to assess the impact of these policy changes. As graduation rates require multiple years of data, we examine term-to-term retention, annual retention, and number of credits earned instead. Term retention is defined as the percentage of new students enrolled in fall who continue into the winter and spring terms, while annual retention tracks the percentage of new students who enroll in the fall and return the following fall.⁴ We look at retention for both incoming freshmen and students in their second or later years of college.

The remainder of this report is structured as follows: Chapter Two presents the findings, starting with an overview of the students served by the OOG, followed by an analysis of the program's financial impact, and concluding with student success and performance data. Chapter Three summarizes the findings and discusses their implications.

⁴ For annual retention, students may or may not have been enrolled in the winter and spring terms of the first year to be counted as having retained. If they enrolled in the fall of year one and are enrolled in the fall of year two, they are considered to have retained. Students who earn a credential before the following year are excluded from the rate.

CHAPTER 2. FINDINGS

WHOM DOES THE OREGON OPPORTUNITY GRANT SERVE?

Every year, tens of thousands of students in Oregon benefit from the Oregon Opportunity Grant (OOG) to help cover college or university expenses. As illustrated in Figure 2.1 below, the number of students receiving an OOG has changed with statute modifications, funding variations, and enrollment changes. In the 2022-23 academic year, 35,830 Oregon students enrolled in community colleges, public universities, and private, non-profit institutions offering bachelor's degrees received the OOG. Expanded eligibility in 2021-22 and 2022-23 compared to the previous three years led to the increase in students served in the most recent two years.

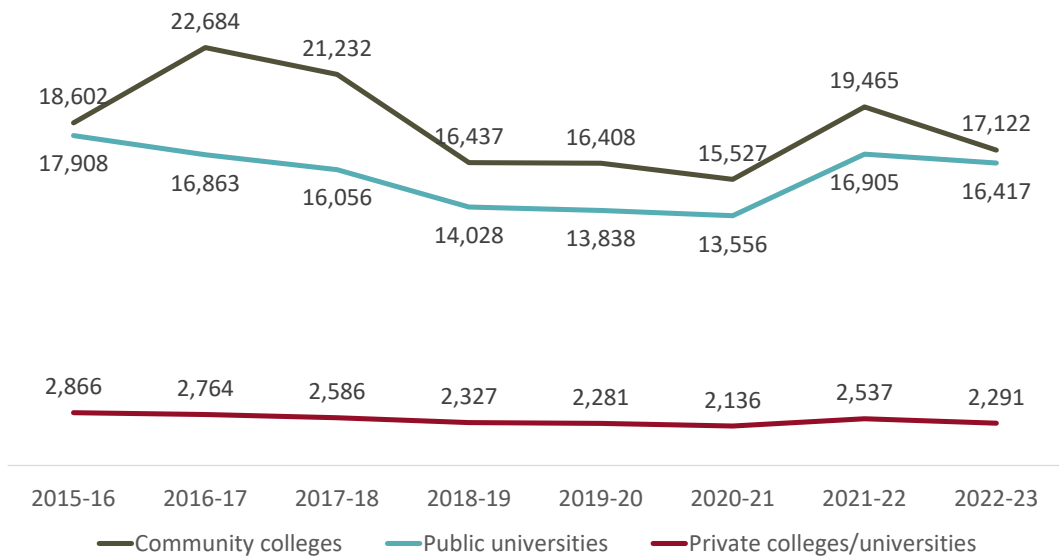


FIGURE 2.1. NUMBER OF STUDENTS RECEIVING OREGON OPPORTUNITY GRANT, BY YEAR AND EDUCATIONAL SECTOR, 2015-16 THROUGH 2022-23.

How Do Students with an OOG in 2022-23 Compare to Other Students?

As in previous years, students who received the Oregon Opportunity Grant (OOG) in 2022-23 were more likely to come from marginalized backgrounds compared to other students. Compared to students with an expected family contribution (EFC) above the OOG eligibility threshold, OOG recipients were more often students of color (45 percent vs. 33 percent), older (33 percent vs. 22 percent), women (62 percent vs. 56 percent), and residents of rural counties (15 percent vs. 12 percent). Additionally, compared to all for-credit and admitted Oregon college/university students, OOG recipients were more likely to be students of color, women, older individuals, and those from

rural areas. Table 2.1 provides a breakdown of the racial/ethnic and gender identities, age groups, and geographic backgrounds of students by OOG status.⁵

TABLE 2.1. CHARACTERISTICS OF STUDENTS WITH OREGON OPPORTUNITY GRANT (OOG), STUDENTS WITH AN EFC ABOVE THE OOG THRESHOLD, AND ALL CREDENTIAL-SEEKING STUDENTS, FALL TERM 2022-23.

	Students with OOG	Students with EFC above OOG threshold	Oregon students in general
Number	33,562	41,134	111,554
Race/ethnicity			
Asian American/Asian	6%	6%	6%
Black/African American	4%	2%	3%
Latino/a/x/Hispanic	26%	11%	19%
Native American/Alaska Native	1%	7%	1%
Native Hawaiian/Pacific Islander	1%	1%	1%
Two or more races	6%	7%	6%
White	52%	63%	60%
Not reported	3%	4%	4%
Gender			
Women	62%	56%	54%
Men	37%	43%	45%
Nonbinary	0%	0%	0%
Not reported	1%	1%	1%
Age			
Less than to 24	67%	78%	70%
25 and older	33%	22%	30%
Geography			
Rural county	15%	12%	13%
Urban or mixed county	78%	74%	78%
Not reported	7%	14%	9%

Source: HECC analysis of student-level data.

Notes: Data refer to students fall term students only to be comparable with prior year data shown in Table 2. Prior to 2021-22, students had to begin in fall term to receive an OOG. “Oregon students in general” includes students at community colleges taking for-credit classes, Oregon admitted undergraduates at public universities, and Oregon admitted undergraduates who filed a FAFSA/ORSA at private bachelor’s degree-granting institutions.

The recent increases in the EFC eligibility threshold of the OOG have made the demographic profile of the students served more similar to that of Pell Grant recipients. Table 2.2 shows the characteristics of 2022-23 OOG recipients, 2021-22 OOG recipients, earlier Pell Grant recipients (who had EFCs similar to the most recent OOG recipients), and earlier OOG recipients (who had lower EFCs and typically came from the lowest-income backgrounds). In most respects, the recent

⁵ The data in Table 2.1 is for students enrolled in the fall only whereas Figure 1 is for all students in the academic year.

OOG recipients are comparable to both previous Pell Grant recipients and earlier OOG recipients. The 2022-23 OOG recipients were slightly more likely to identify as Latino/a/x/Hispanic than the earlier groups, but other racial/ethnic, gender, age, and geographic representation is similar. Thus, the program continues to support students from historically marginalized communities in higher education, even with the new higher eligibility threshold.

TABLE 2.2. CHARACTERISTICS OF STUDENTS WITH OREGON OPPORTUNITY GRANT (OOG) AND PELL GRANT BETWEEN 2016-17 AND 2020-21 AND STUDENTS WITH OOG IN 2021-22 AND 2022-23.

	Students with OOG, 2016-17 to 2020-21 (lowest income)	Students above OOG threshold but with Pell Grant, 2016-17 to 2020-21*	Students with OOG, 2021-22	Students with OOG, 2022-23
Number	--	--	35,654	33,562
Race/ethnicity				
Asian American/Asian	6%	5%	6%	6%
Black/African American	4%	4%	4%	4%
Latino/a/x/Hispanic	20%	20%	24%	26%
Native American/Alaska Native	2%	2%	1%	1%
Native Hawaiian/Pacific Islander	0%	1%	0%	1%
Two or more races	6%	6%	6%	6%
White	56%	58%	53%	52%
Not reported	5%	5%	5%	3%
Gender				
Women	61%	56%	62%	62%
Men	39%	43%	37%	37%
Nonbinary	0%	0%	0%	0%
Not reported	1%	1%	1%	1%
Age				
24 and younger	63%	63%	65%	67%
25 and older	37%	37%	35%	33%
Geography				
Rural county	16%	15%	14%	15%
Urban or mixed county	76%	76%	78%	78%
Not reported	8%	9%	8%	7%

Source: HECC analysis of student-level data.

*Received Pell but not OOG

These results show that the nearly 36,000 Oregon students who received an OOG award in 2022-23 were more likely to come from communities that are underrepresented in postsecondary education and training compared to their higher-income peers and were similar to students who received the

grant in previous years. The next section describes the impact that the OOG has on college affordability.

AFFORDABILITY UNDER THE OREGON OPPORTUNITY GRANT

Fundamentally, the Oregon Opportunity Grant (OOG) is aimed at making college and university more affordable. This section examines the extent to which the grant improves affordability, both for the students it serves and for Oregon affordability rates overall.

Measuring Affordability

We define college/university affordability as the ability to pay for the total cost of attendance at an institution. We estimate students' ability to pay with their expected resources, including any federal and state grant aid students receive, most institutional aid, their expected family contribution (EFC) from the FAFSA/ORSAA, and an estimate of student earnings.⁶ The cost of attendance comes from institutions' costs that they publish each year and includes tuition and fees, room and board, books and supplies, transportation, and personal expenses. We calculate this measure for each individual student at the public universities and community colleges, using the amount of their grant aid, their EFC, and their institution's cost of attendance, prorated to the number of hours in which they enrolled. Students whose expected costs outweigh their expected resources are deemed as facing unaffordable costs. This affordability rate measure is currently available for Oregon students who attended a public university or community college and who filed a complete FAFSA/ORSAA.

Using this measure, more than one-third of Oregon students (36 percent) were unable to meet the cost of attendance at their institution with their expected resources in 2022-23. The rate is higher for public university students (50 percent) and lower for community college students (25 percent) because cost of attendance varies across the two sectors (See Table 2.3). Within each sector, affordability is somewhat worse for most students of color than for White students and relatively similar across geographic, gender, and age groups (see Appendix B). However, it varies substantially across income groups. Even with financial aid, the ability to cover the cost of attendance is worse at lower income levels. Among students who receive the need-based OOG, 54 percent of students could not meet the cost of attendance with expected resources, compared to 24 percent of students whose incomes were above the OOG threshold.

⁶ Institutional aid comes primarily from universities, and we include institutional aid for university students. The estimate of student earnings is 90 percent of minimum wage for 15 hours per week and 48 weeks per year.

TABLE 2.3. ESTIMATED PERCENTAGE OF STUDENTS WHO COULD NOT MEET COST OF ATTENDANCE WITH EXPECTED RESOURCES, BY SECTOR AND INCOME LEVEL, 2022-23.

Sector and Income Level	Percentage of students facing unaffordable costs
Statewide	36%
Low-income (OOG recipient)	54%
Middle/upper income (not OOG recipient)	24%
Community college	25%
Low-income (OOG recipient)	42%
Middle/upper income (not OOG recipient)	14%
Public university	50%
Low-income (OOG recipient)	68%
Middle/upper income (not OOG recipient)	37%

The OOG has a sizeable impact on these rates. Though half of students who received an OOG faced unaffordable costs in 2022-23 (54 percent), two-thirds (67 percent) would have faced unaffordable costs if they had not had the grant. Table 2.4 shows what the affordability rate would be without the OOG program. This improvement translates to numbers of students: In 2022-23, we estimate that more than 4,300 students were able to cover the cost of attendance because of the OOG.

TABLE 2.4. ESTIMATED PERCENTAGE OF STUDENTS WHO WOULD NOT MEET COST OF ATTENDANCE WITH EXPECTED RESOURCES, BY SECTOR, INCOME LEVEL, AND OOG, 2022-23.

Sector and Income Level	Percentage of students facing unaffordable costs with OOG	Percentage of students facing unaffordable costs without OOG
Statewide	36%	41%
Low-income (OOG recipient)	54%	67%
Middle/upper income (not OOG recipient)	24%	24%
Community college	25%	30%
Low-income (OOG recipient)	42%	56%
Middle/upper income (not OOG recipient)	14%	14%
Public university	50%	55%
Low-income (OOG recipient)	68%	80%
Middle/upper income (not OOG recipient)	37%	37%

As noted previously, 2022-23 year was the first year of the larger size of the OOG grant, on top of the higher EFC eligibility implemented in 2021-22. The impact of these two policy changes—and the increased funding that led to them—is evident in the larger impact on affordability that the OOG made in these years. In 2020-21, the overall affordability rate was 40 percent (i.e., 40 percent of students faced unaffordable costs); it would have been 43 percent without the OOG. By 2022-23, this three percentage-point impact grew to five percentage points (the overall rate was 36 percent but would have been 41 percent without the OOG). The difference is even greater among low-income students: in 2020-21, the program improved affordability by 10 percentage points, and two years later it improved affordability by 13 percentage points.

This section described the impact of the OOG on college/university affordability. It illustrated the substantially greater affordability challenge faced by low-income students and the improvement to college affordability that the OOG makes. The grant makes the full cost of college/university affordable for more than 4,300 students and makes that cost much more affordable for thousands more. The higher EFC threshold and the larger size of the grant mean that the OOG has improved affordability more than in previous years.

STUDENT SUCCESS UNDER THE OREGON OPPORTUNITY GRANT

Retention and Credits Earned

This section analyzes the academic performance of students who received the OOG in college or university. The significant expansions to the program in 2021-22 and 2022-23 mean that we must use outcomes that draw on a single year of data to isolate their effects. Therefore, this report focuses on term-to-term retention, year-to-year retention, and the number of credits earned by OOG recipients. Term-to-term retention is defined as the percentage of new students who enrolled in the fall term and returned for the winter and/or spring terms. Oregon's community colleges and public universities operate on a three-term academic year, so we assess the percentage of fall term students who return for winter term and those who continue to spring term. In contrast, private colleges and universities in Oregon have two terms, and term-to-term retention is measured as the percentage of fall term students who return for the spring term. Year-to-year retention is evaluated uniformly for all institutions, calculated as the percentage of new, fall term students who re-enroll the following fall term (regardless of their enrollment status during the intervening winter and/or spring terms). Future reports will examine graduation rates, when a cohort of students with the higher EFC eligibility threshold and the higher award size have been in school for some years.

In the 2022-23 academic year, students receiving the OOG had retention rates comparable to or greater than their higher-income peers and then all students in 2022-23. Table 2.5 presents the retention rates for OOG recipients, for students who completed a FAFSA/ORSA but were ineligible for the OOG, and for the broader population of Oregon students. The findings indicate that OOG recipients often have higher retention rates than higher-income students and then all students at community colleges, while the retention rates of OOG recipients at public universities and private non-profit institutions are very similar to those of other students. These trends are consistent across all retention measures assessed.

TABLE 2.5. PERCENTAGE OF NEW STUDENTS ENROLLED IN FALL TERM WHO CONTINUED TO WINTER TERM AND TO SPRING TERM AND PERCENTAGE ENROLLED IN FALL 2022 WHO WERE ALSO ENROLLED IN FALL 2023, BY SECTOR AND OOG STATUS, 2022-23.

	Students with OOG	Students with EFC above OOG threshold	Oregon students in general
Enrolled fall and winter terms			
Community college	82%	75%	74%
Public university	94%	94%	93%
Private institution	N/A	N/A	N/A
Enrolled fall, winter, and spring terms			
Community college	68%	62%	60%
Public university	88%	89%	88%
Private institution	92%	92%	N/A
Enrolled fall 2021 and fall 2022			
Community college	56%	54%	51%
Public university	80%	83%	81%
Private institution	79%	78%	N/A

Source: HECC analysis of student-level data.

Notes: “Oregon students in general” includes students at community colleges taking for-credit classes, Oregon admitted undergraduates at public universities, and Oregon admitted undergraduates who filed a FAFSA/ORSAAs at private bachelor’s degree-granting institutions. All columns include new and returning students. Private institutions are on semester schedules, and their fall to spring semester retention is included in the rates for fall winter and spring terms.

Table 2.6 presents another measure of student success: the number of credits earned by students in 2022-23. Students with an OOG earned more credits than their peers at community colleges, while their credit accumulation at public universities and private institutions was nearly identical. This comparison includes students with an expected family contribution (EFC) above the OOG eligibility threshold (i.e., students from middle- and upper-income backgrounds) as well as Oregon students in general, including those who did not apply for financial aid. It is important to note that, on average, students at public institutions earn more credits than those at private institutions, as public institutions operate on a three-term academic calendar while private institutions use a two-term calendar.

TABLE 2.6. AVERAGE NUMBER OF CREDITS EARNED BY STUDENTS IN 2022-23, BY OOG STATUS AND EDUCATIONAL SECTOR.

	Students with OOG	Students with EFC above OOG limit	Oregon students in general
Community college	25	22	20
Public university	38	38	37
Private institution	27	27	N/A

Source: HECC analysis of student-level data.

Notes: “Oregon students in general” includes students at community colleges taking for-credit classes, Oregon admitted undergraduates at public universities, and Oregon admitted undergraduates who filed a FAFSA/ORSA at private bachelor’s degree-granting institutions. All columns include new and returning students. Public institutions have three terms in the academic year, with 90 credits required for an associate degree and 180 credits required for a bachelor’s degree. The private institutions included in this analysis are on two-term schedules, with 120 credits required for a bachelor’s degree.

Retention and Credits Earned for Students with the OOG in 2022-23 Compared to Earlier Students

We also compared retention rates and average number of credits of 2022-23 OOG recipients with those of low-income students from earlier years to better understand the potential effects of raising the OOG EFC threshold and expanding the award size. The earlier comparison groups include a) those who received the OOG in 2016-17 through 2020-21 when the EFC threshold was lower (i.e., they had the lowest incomes) and b) those who received a Pell Grant but whose EFC was above the OOG threshold (i.e., low income). In general, the two recent cohorts of OOG recipients have retention rates that are as good or better than the retention rates of earlier groups of low-income students. Two exceptions are that earlier groups of OOG recipients (the lowest income group) had slightly higher fall-to-winter retention than the newer cohorts at the community colleges and slightly higher fall-to-spring retention at the private institutions. In general, however, the newer cohorts with expanded EFC do as well or better than the earlier cohorts. This is particularly the case for the 2022-23 recipients, who also had larger grant award size. Based on these limited years of data, the increased EFC eligibility and larger award size appear associated with improved retention, at least to some degree.

TABLE 2.7. PERCENTAGE OF NEW STUDENTS ENROLLED IN FALL TERM WHO CONTINUED TO WINTER TERM AND TO SPRING TERM AND PERCENTAGE ENROLLED IN FALL 2021 WHO WERE ALSO ENROLLED IN FALL 2022, AMONG STUDENTS WITH PELL GRANTS AND STUDENTS WITH OOG BETWEEN 2016-17 AND 2020-21 AND STUDENTS WITH OOG IN 2021-22 AND 2022-23.

	Students with Pell Grant, 2016-17 to 2020-21	Students with OOG, 2016-17 to 2020-21	Students with OOG, 2021-22	Students with OOG, 2022-23
Enrolled fall and winter terms				
Community college	76%	85%	81%	82%
Public university	93%	89%	93%	94%
Private institution	N/A	N/A	N/A	N/A
Enrolled fall, winter, and spring terms				
Community college	62%	68%	64%	68%
Public university	87%	79%	86%	88%
Private institution	91%	97%	91%	92%
Fall-to-fall retention rate				
Community college	45%	48%	54%	56%
Public university	79%	74%	78%	80%
Private institution	79%	72%	70%	79%

Source: HECC analysis of student-level data.

Finally, we compared the number of credits earned by students in the most recent to cohorts of OOG recipients with the credits earned by earlier groups of low-income students. Our findings revealed minimal to no differences and no consistent pattern of differences in the number of credits earned among these four groups, with the exception of students who received a Pell Grant and no OOG between 2016-17 and 2020-21, as illustrated in Table 2.8 below.

TABLE 2.8. NUMBER OF CREDITS EARNED BY STUDENTS IN 2021-22 AND 2022-23, BY OOG STATUS AND EDUCATIONAL SECTOR.

	Students with Pell Grant, 2016-17 to 2020-21	Students with OOG, 2016-17 to 2020-21	Students with OOG, 2021-22	Students with OOG, 2022-23
Community college	19	25	22	23
Public university	36	38	38	38
Private institution	27	28	26	27

Source: HECC analysis of student-level data.

Notes: Includes new and returning students.

This section evaluates the academic performance of OOG recipients in the 2021-22 and 2022-23 academic years, focusing on term-to-term retention, year-to-year retention, and credits earned. OOG recipients demonstrated higher retention rates than their peers at community colleges, while their rates at public universities and private non-profit institutions were similar to those of other students. In terms of credits earned, OOG recipients outperformed their higher income and other peers at community colleges and had similar results at public universities and private institutions. Additionally,

when comparing new OOG students in 2022-23 to earlier groups including Pell Grant recipients, retention rates were generally higher for OOG recipients. Results show minimal differences in the number of credits earned among the groups analyzed.

CHAPTER 3. CONCLUSION

SUMMARY OF FINDINGS

The Oregon Opportunity Grant (OOG) served nearly 36,000 Oregon students in 2022-23 with a notably higher eligibility threshold and a grant that was 30 percent larger than in previous years. In addition to coming from low-income families, students with the OOG were more likely than students in general to come from other communities that are marginalized in postsecondary education and training as well—students of color, women, older students, and students from rural counties. Compared to low-income students from prior years (i.e., OOG and Pell recipients), OOG recipients in 2022-23 were generally similar but somewhat more likely to be Latino/a/x/Hispanic and younger. Thus, even under the higher eligibility threshold, many of the students who are least represented in college and university continue to be the ones receiving an OOG.

Low-income students, including those served by the OOG, face substantially larger affordability challenges than their middle- and upper-income peers. Students from low-income backgrounds are much less likely than other students to be able to cover the full cost of college/university even after taking financial aid, expected family contribution (EFC), and student earnings into account. Results here show that the OOG makes substantial improvements to affordability. The grant enables more than 4,300 students able to meet the full cost of attendance with their expected resources and improves that affordability for thousands more. The program's impact on affordability was greater in 2022-23 than in previous years because of its higher EFC threshold and larger grant size.

OOG recipients in 2022-23 had academic performance that was similar to or better than other students, including their higher income peers, students overall in 2022-23, and low-income students from prior years, despite the steeper challenges that low-income students face. With only one year of complete data under the 2022-23 program changes, we used same year measures to assess academic performance: term-to-term retention, year-to-year retention, and credits earned. OOG recipients demonstrated higher retention rates, and more credits earned than their peers at community colleges, and they had similar retention rates and credits earned as their peers at public universities and private non-profit institutions. Additionally, when comparing new OOG students in 2022-23 to earlier low-income groups, 2022-23 OOG recipients generally had higher retention rates and similar numbers of credits earned. Exceptions to these findings were isolated and not consistent of a trend. The positive results for 2022-23 OOG recipients are consistent with those in previously published reports.

IMPLICATIONS

This report examined the characteristics of students served by the OOG, the impact of the OOG on college/university affordability, and the academic success of the students who have the grant. The results depict a program that serves students who are underrepresented in college and university, eases its high cost, and is characterized by the academic success of its participants. The fact that outcomes for lower income students are repeatedly higher than or similar to the outcomes for higher income students is remarkable. Lower income students are more often first-generation college

students and face a range of hurdles in pursuing college and university success. Moreover, these results are consistent with those of earlier evaluations of the program, across different measures of academic performance, multiple comparison groups, rising eligibility thresholds, different grant sizes, and multiple years. This is a notably consistent set of positive outcomes for a single program.

These results are also consistent with national research that demonstrates the positive impact on student success of public grants, especially state financial aid grants.⁷ The program changes for grant recipients in 2022-23 made this state support available to new groups of students. For the second year in a row, students from low-income families were able to combine the OOG with the federal Pell Grant to make college and university more possible than ever before. In addition, the OOG became available for many more students whose EFC was just above the Pell Grant limit, making the state support shown to improve academic success now available to a greater share of Oregon college and university students.

The impact of these outcomes extends beyond students' college and university careers. Higher retention and progression leads to higher graduation, and postsecondary degrees open the door to greater economic and social stability for individuals, families, and the state. Individuals with postsecondary degrees not only earn more, but they also tend to be less affected by economic downturns, and they contribute more tax revenue to Oregon's General Fund. Moreover, the state is projected to need many more workers with postsecondary degrees in the coming decade than the number who currently graduate from Oregon institutions. Filling this projected need requires drawing first-generation and underrepresented groups into college and university and ensuring their graduation. The positive outcomes of the OOG shown here contribute to this state need.

The positive results from the most recent program expansion, the repetition of positive results across measures, groups, and years, and the need for more workers with postsecondary degrees point to sustaining and broadening the Oregon Opportunity Grant program. We recommend the program continue to be expanded and advanced.

⁷Nguyen, 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.

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APPENDIX A. OREGON OPPORTUNITY GRANT AWARDING CRITERIA AND AMOUNTS

TABLE A.1. AVERAGE ANNUAL COST OF ATTENDANCE BY SECTOR AND THRESHOLDS FOR RECEIVING FEDERAL PELL GRANTS AND OOG AWARDS, 2012-13 THROUGH 2022-23.

	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24
Average yearly cost of attendance, community colleges	\$17,031	\$17,374	\$17,735	\$18,223	\$19,147	\$19,893	\$20,485	\$20,796	\$21,091	\$21,124	\$22,549	\$25,154
Average yearly cost of attendance, public universities	\$20,693	\$21,192	\$21,540	\$22,263	\$23,466	\$24,474	\$25,232	\$25,908	\$27,733	\$28,177	\$29,826	\$31,325
Yearly maximum EFC to receive a Federal Pell Grant	\$4,995	\$5,081	\$5,157	\$5,198	\$5,234	\$5,328	\$5,486	\$5,576	\$5,711	\$5,846	\$6,206	\$6,656
Yearly awarding criteria limits, OOG	\$70,000	\$70,000	\$70,000	\$4,000	\$3,500	\$3,500	\$3,500	\$3,500	\$3,500	\$6,000	\$8,000	\$8,000
Yearly awarding criteria metric	Adjusted Gross Income				Expected Family Contribution							

TABLE A.2. AVERAGE OOG DISBURSEMENT AMOUNTS, BY SECTOR, 2012-13 TO 2022-23.

	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23
Community colleges	\$1,384	\$1,404	\$1,382	\$1,429	\$1,502	\$1,533	\$1,774	\$1,835	\$1,818	\$1,996	\$2,257
Public universities	\$1,766	\$1,796	\$1,762	\$1,819	\$1,909	\$1,910	\$2,766	\$2,901	\$3,083	\$3,196	\$3,678
Private non-profit institutions	\$1,768	\$1,794	\$1,775	\$1,876	\$1,985	\$1,979	\$2,889	\$2,919	\$3,321	\$3,409	\$3,860
Overall	\$1,569	\$1,600	\$1,579	\$1,639	\$1,696	\$1,714	\$2,277	\$2,364	\$2,468	\$2,642	\$3,034

TABLE A.3. ANNUAL MAXIMUM OOG AWARD AMOUNTS BY SECTOR FROM 2012-13 TO 2023-24.

	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24
Community college	\$1,950	\$2,000	\$2,000	\$2,100	\$2,250	\$2,250	\$2,600	\$2,700	\$2,778	\$2,778	\$3,600	\$3,900
Public university	\$1,950	\$2,000	\$2,000	\$2,100	\$2,250	\$2,250	\$3,200	\$3,300	\$3,600	\$3,612	\$4,692	\$7,524
Private non-profit institutions	\$1,950	\$2,000	\$2,000	\$2,100	\$2,250	\$2,250	\$3,200	\$3,300	\$3,600	\$3,612	\$4,692	\$7,524

APPENDIX B. AFFORDABILITY RATE BY STUDENT CHARACTERISTICS.

TABLE B.4. ESTIMATED PERCENTAGE OF STUDENTS FACING UNAFFORDABLE COSTS, BY STUDENT CHARACTERISTIC AND SECTOR, 2022-23.

Student Characteristics	Public University	Community College	Statewide
Statewide	50%	25%	36%
Income background			
Lower-income (OOG recipient)	68%	42%	54%
Middle/upper income (not OOG recipient)	37%	14%	24%
Racial/ethnic identity			
Asian American/Asian	57%	24%	43%
Black/African American	56%	27%	39%
Latino/a/x/Hispanic	57%	29%	40%
Native American/Alaska Native	34%	24%	28%
Native Hawaiian/Pacific Islander	54%	26%	36%
Multiracial	47%	26%	36%
White	47%	24%	34%
Geography			
Rural county	44%	24%	31%
Urban and mixed counties	50%	26%	37%
Gender			
Men	50%	26%	37%
Nonbinary	51%	24%	40%
Women	49%	25%	35%
Age group			
18-24	49%	24%	37%
25+	52%	27%	35%

Note: Affordability is better for Native American/Alaska Native students, than for other students because of the Oregon Tribal Student Grant, which covers the cost of attendance for students from Oregon’s nine federally recognized tribes.

