

OFFICE OF UNIVERSITY COORDINATION: 2015-16 PUBLIC UNIVERSITY BUDGET REPORT SUMMARY



INTRODUCTION

Introduction	4
2015-17 Budget Summary	5
2015-17 LAB Summary Table	8
Comparison of Biennial Budgets	9

2015-17 FUNDING ALLOCATION

Public University Support Fund (PUSF)	10
Student Success and Completion Model (SSCM) Background	10
SSCM Transition Period	12
Approach to 2015-17 SSCM True Up and Funding Allocation Distribution)	13
Mission Differentiation Programs	14
Non-PUSF Funding	20
State Programs	20
Statewide Public Service Programs	23
Sports Lottery	24
Fiscal Year 2015-16 Summary	25
2015-17 Projected Allocations	28

EDUCATION AND OTHER GENERAL FUNDS REVENUE

Education and Other General Funds Revenue	30
---	----

DEBT SERVICE AND CAPITAL CONSTRUCTION

Debt Service	32
--------------	----

2015-17 Debt Service Budget	34
University Capital Construction Budget for 2015-17	35

APPENDICES

Appendix A: Glossary and Common Abbreviations	37
Appendix B: Legislative Budget Notes	40
Appendix C: Other Key Bills from the 2015 Legislative Session	41
Appendix D: Relevant Oregon Administrative Rules	42
Appendix E: SSCM Cost Weighting and Data	60
Appendix FY 15 Final Detail Allocation Table	85
Appendix G: Budget and Bill Summaries for Referenced Bills	88

INTRODUCTION

The annual *Public University Budget Report Summary* (BRS) is a reference document containing Legislatively Approved Budget (LAB) allocations of state appropriations, HECC-determined allocations to institutions as a result of this LAB and other budget related information. The BRS provides detailed funding allocation information, institutional information on enrollment, legislative bill summaries and projections of Statewide Public Service, lottery, self-support and tuition revenue. For further detail on an institution's spending, please consult its individual budget. This BRS only concerns Oregon's seven public universities, and does not fully cover the budget of any other HECC division.

This document will be issued annually. The edition issued in odd numbered years will contain full details on programs, funding, etc, while the edition issued in even numbered years will mainly consist of updates on funding and any programmatic changes made by the legislature, institutions or the HECC.

THE HIGHER EDUCATION COORDINATING COMMISSION (HECC):

ORS 350.075(3e) states that the HECC shall:

(A) Each biennium, after receiving funding requests from the states community colleges and public universities as authorized by law, recommend to the Governor a consolidated higher education budget request aligned with the strategic plan described in subsection (3)(d) of this section, including appropriations for:

(i) Student access programs;

(ii) Public universities listed in ORS 352.002 including but not limited to education and general operations, statewide public services and state-funded debt service;

Part of that responsibility involves tracking and summarizing the overall state budget picture for public universities. Since under ORS 352.107, universities with a governing board are allowed to spend most funds as they see fit consistent with relevant law, the HECC does not have authority to regulate specific expenditure choices by institutions.

However, the HECC is charged through ORS 350.075(3)(iii)(f) with the responsibility to:

Adopt rules governing the distribution of appropriations from the Legislative Assembly to community colleges, public universities listed in ORS 352.002 and student access programs. These rules must be based on allocation formulas developed in consultation with the state's community colleges and public universities, as appropriate.

These allocation rules, codified as Oregon Administrative Rules (OAR) 715-013-0060 and 715-013-0062 collectively form the basis Student Success and Completion Model (SSCM)¹, an outcomes-based approach to the allocation of the Public University Support Fund (PUSF) between Oregon's seven public universities. The SSCM replaces the former allocation system, the Resource Allocation Model (RAM), beginning in FY 2016 and focuses more state funding on measureable outcomes (largely degree completions). The SSCM will be described in more detail later in this document.

Additionally, OAR 715-013-0064 and 715-013-0066 provide the allocation basis for various state program funds. The text of all four referenced OARs is included as appendices.

¹ The SSCM consists of oars 715-013-0025 and 715-013-0040 <http://arcweb.sos.state.or.us/pages/rules/oars_700/oar_715/715_013.html>

2015-17 BUDGET SUMMARY:

Approximately \$941.3 million in State General Fund is appropriated to Oregon's public universities for the 2015-17 biennium. This represents an increase of 27.4% over the final 2013-15 General Fund budget.

Legislative Background:

Two policy bills with major governance changes for post-secondary education were passed during the 2015 regular session. This discussion focuses only on aspects with impact on budget allocation processes.

SB 80² abolished the Oregon University System (OUS), the office of the Chancellor of the Oregon University System and the State Board of Higher Education. SB 80 further states that all seven public universities are operated by independent governing boards as outlined in 2013's SB 270³. SB 80 transfers the funds from several accounts that had been held by the OUS into a new "Public University Fund" but maintains pre-existing restrictions on the usage of the funds. Finally, SB 80 adds the HECC to the bodies authorized to take action with respect to the Western Interstate Commission for Higher Education (WICHE) and substitutes the HECC for the State Board of Higher Education throughout Oregon law.

HB 3199⁴ transitioned bonding authority and oversight from OUS and DAS to the HECC and DAS. The HECC will be responsible for conducting revenue sufficiency tests for XI-F (1) bonds, ensuring compliance with rules for XI-G and XI-Q bonds and collecting and monitoring all debt service payments for state-issued debt. The HECC anticipates hiring additional staff to handle these increased responsibilities. Funding for this increased staff is provided through HB 5024, the primary university funding bill.

Combined, SB 80 and HB 3199 have the practical effect of completing the OUS-to-HECC transition begun in 2013 with SB 270. In particular, these two bills drew clear lines of agency responsible for components of the budgeting process and administration. Most state appropriated funds (except those via fees or other institutional revenues) will flow through the HECC, as will select federal and other funds. These two bills ensure that these funds flow smoothly and efficiently and maintain appropriate oversight of the capital bonding and construction process.

The 2015-17 Legislatively Approved Budget (LAB) for Public Universities is contained within several bills (complete bill text available as appendices):

HB 5024⁵ is the HECC's main 2015-17 budget bill. It maintains the same basic budget structure as the prior biennium, with funding primarily split between the PUSF (which is allocated almost entirely via the SSCM) and the state programs area. The PUSF represents the state's General Fund contribution to the operation of education, student support, research, and public service programs. State programs represent General Fund support for certain institutes, centers, and programs operated by the public universities that address economic development, natural resource and other issues. State programs generally do not support the general and educational functions of institutions or students. Many of these programs have an industry-specific focus, matching state support with funds from private sector and other sources. In addition to supporting the

² <<https://olis.leg.state.or.us/liz/2015R1/Downloads/MeasureDocument/SB80>>

³ <<https://olis.leg.state.or.us/liz/2013R1/Downloads/MeasureDocument/SB270/Enrolled>>

⁴ <<https://olis.leg.state.or.us/liz/2015R1/Downloads/MeasureDocument/HB3199>>

⁵ <<https://olis.leg.state.or.us/liz/2015R1/Downloads/MeasureDocument/HB5024/Enrolled>>

general university enterprise and state programs, HB 5024 provides non-PUSF funding for three Statewide Public Service Programs: the Agriculture Experiment Station (AES), Extension Service (ES) and Forest Research Lab (FRL). The final components of HB 5024 appropriate resources from the Sports Lottery Program and provide resources for General Fund debt service expense.

SB 5507⁶ is the budget rebalance bill and provides \$2,862,300 in additional funds to support a new permanent Advanced Wood Products program at Oregon State University (in collaboration with the University of Oregon), to help fund a new wrestling program at Eastern Oregon University and to provide funding for Portland State University's administration of the Willamette Falls Navigation Canal Task Force. Specifically:

- \$2,500,000: New Advanced Wood Products Center at Oregon State University in collaboration with the University of Oregon (Biennialized at \$3,400,000 for the 2017-19 biennium). These resources will be reported in the State Programs category throughout this budget summary.
- \$300,000 (one-time funding): Eastern Oregon University Wrestling Program.
- \$62,300 (one-time funding): Portland State University's support of the Willamette Falls Navigation Canal Task Force (task force was authorized by SB 1317).

Additional funding is appropriated to public universities through the following bills:

HB 2002⁸ provides \$250,431 in one-time funding to Portland State University's Criminal Justice Policy Research Institute to support the Law Enforcement Contacts Policy and Data Review Committee, authorized by ORS 131.906. The committee is tasked with researching contacts between the public and law enforcement to develop policies that prohibit racial profiling and associated training curriculum. The funding supports one full-time project manager, one part-time faculty member and one graduate student for the 2015-17 biennium.⁹

HB 2209¹⁰ provides \$500,000 in one-time funding to Oregon State University for research related to shellfish harvesting and ocean acidification. OSU will use the funds to monitor the effect of ocean acidification at the Whiskey Creek Shellfish Hatchery and to conduct the Molluscan Broodstock Program at the Hatfield Marine Science Center in Newport.¹¹

HB 2998¹² provides \$100,000 in one-time funding to Portland State University's Institute for Natural Resources to map marketable western juniper stands. All of this funding will be disbursed during this fiscal year as per joint request of Portland State University and the Oregon Business Development Department (OBDD).

SB 202¹³ provides \$108,907 in one-time funding to Oregon State University to lead a task force related to the scientific review of natural resources. Portland State and the University of Oregon are also part of this task

⁶<<https://olis.leg.state.or.us/liz/2015R1/Downloads/MeasureDocument/SB5507/Enrolled>>

⁷<<https://olis.leg.state.or.us/liz/2015R1/Downloads/MeasureDocument/SB131/Enrolled>>

⁸<<https://olis.leg.state.or.us/liz/2015R1/Downloads/MeasureDocument/hb2002/Enrolled>>

⁹<<https://olis.leg.state.or.us/liz/2015R1/Downloads/MeasureAnalysisDocument/32144>>

¹⁰<<https://olis.leg.state.or.us/liz/2015R1/Downloads/MeasureDocument/HB2209/Enrolled>>

¹¹<<https://olis.leg.state.or.us/liz/2015R1/Downloads/MeasureAnalysisDocument/32134>>

¹²<<https://olis.leg.state.or.us/liz/2015R1/Downloads/MeasureDocument/hb2998/Enrolled>>

¹³<<https://olis.leg.state.or.us/liz/2015R1/Downloads/MeasureDocument/sb202/Enrolled>>

force. This funding will largely be disbursed in the 2016 fiscal year as the final report for this project is due on September 15, 2016.

SB 860¹⁴ provides \$427,500 to be split between one Technical and Regional University (TRUs) and one research university to be selected by the HECC to conduct a pilot program on mentoring students from low-income or first generation college-attending backgrounds. Funding will be provided in the final 18 months of the biennium once grant recipients are selected. Because distribution of the funds is contingent upon the successful application of two institutions, the \$427,500 will generally not be included in the tables and totals reported in this document. Provided qualifying applications are received and funds are subsequently awarded, amended and future versions of this Budget Report Summary will treat the \$427,500 in SB 860 in a similar way to Public University State Programs items.

¹⁴<<https://olis.leg.state.or.us/liz/2015R1/Downloads/MeasureDocument/sb860/Enrolled>>

2015-17 LAB Summary Table

The following table summarizes total university funding by bill. It does not include grant-type programs like that authorized in SB 860.

2015-17 Legislatively Adopted Budget							
Description	HB 5024	HB 2209	SB 202	SB 5507	HB 2998	HB 2002	Total
State General Fund							
Public University Support Fund	\$ 665,000,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 665,000,000
Public University State Programs ¹	\$ 34,298,725	\$ 500,000	\$ 108,907	\$ 2,862,300	\$ 100,000	\$ 250,431	\$ 38,120,363
Education & General Subtotal	\$ 699,298,725	\$ 500,000	\$ 108,907	\$ 2,862,300	\$ 100,000	\$ 250,431	\$ 703,120,363
Agricultural Experiment Station	\$ 63,121,066	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 63,121,066
Extension Service	\$ 45,601,540	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 45,601,540
Forest Research Laboratory	\$ 9,771,107	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 9,771,107
Statewide Public Services Subtotal	\$ 118,493,713	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 118,493,713
Subtotal Operations	\$ 817,792,438	\$ 500,000	\$ 108,907	\$ 2,862,300	\$ 100,000	\$ 250,431	\$ 821,614,076
Debt Service	\$ 119,704,939	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 119,704,939
Capital Construction	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total General Fund²	\$ 937,497,377	\$ 500,000	\$ 108,907	\$ 2,862,300	\$ 100,000	\$ 250,431	\$ 941,319,015
Lottery Fund							
Sports Lottery	\$ 8,240,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 8,240,000
Debt Service	\$ 31,887,710	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 31,887,710
Total Lottery Fund	\$ 40,127,710	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 40,127,710
Total General and Lottery Funds	\$ 977,625,087	\$ 500,000	\$ 108,907	\$ 2,862,300	\$ 100,000	\$ 250,431	\$ 981,446,725
<i>Debt Service - Combined GF & LF</i>	\$ 151,592,649	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 151,592,649

1) For 2015-17, Public University State Programs include \$1,321,638 of one-time funding (HB 2209, SB 202, SB 5507, HB 2998, HB 2002). For 2013-15, State Programs include \$1,229,000 of one-time funding (HB 2427, HB 3451, HB 5001).

2) For 2009-11 includes federal stimulus funds passed through the state.

Comparison of Biennial Budgets

Comparison of Biennial Budgets					
Fund/Program	2009-11 Final LAB	2011-13 Final LAB	2013-15 Final LAB	2015-17 Legislatively Approved Budget	
				Legislatively Adopted Budget	Comp to 13-15 LAB
State General Fund					
Education & General - GF Only	562,502,731	486,520,696			
Public Univ Support Fund			522,845,511	665,000,000	
Public University State Programs ¹			25,755,757	38,120,363	
				-	
E&G - Federal Stimulus	70,823,654	-	-	-	
E&G Subtotal	633,326,385	486,520,696	548,601,268	703,120,363	28.2%
AES	53,498,403	51,793,494	55,375,282	63,121,066	14.0%
ES	39,087,553	37,463,402	39,909,526	45,601,540	14.3%
FRL	5,829,217	5,698,684	6,070,772	9,771,107	61.0%
SWPS Subtotal	98,415,173	94,955,580	101,355,580	118,493,713	16.9%
Subtotal Operations	731,741,558	581,476,276	649,956,848	821,614,076	26.4%
Debt Service	68,736,956	86,788,277	89,165,306	119,704,939	34.3%
Capital Construction	-	-	-	-	
Total General Fund ²	800,478,514	668,264,553	739,122,154	941,319,015	27.4%
Lottery Funds					
Sports Lottery	9,665,082	8,405,488	8,000,000	8,240,000	3.0%
Debt Service	13,439,349	14,394,033	25,571,489	31,887,710	24.7%
Total Lottery	23,104,431	22,799,521	33,571,489	40,127,710	19.5%
Grand Total	823,582,945	691,064,074	772,693,643	981,446,725	27.0%
Debt Service - Combined GF & LF	82,176,305	101,182,310	114,736,795	151,592,649	32.1%
<p>1) For 2015-17, State Programs include \$1,321,638 of one-time funding (HB 2209, SB 202, SB 5507, HB 2998, HB 2002). For 2013-15, State Programs include \$1,229,000 of one-time funding (HB 2427, HB 3451, HB 5001).</p> <p>2) For 2009-11 includes federal stimulus funds passed through the state.</p>					

2015-17 FUNDING ALLOCATION

PUBLIC UNIVERSITY SUPPORT FUND (PUSF):

The \$665 million PUSF is comprised of five funding areas, three of which are included in the SSCM and total \$617,951,176. In past biennia, the PUSF included funding for specific targeted programs but this convention was modified in FY16 with the absorption of the targeted programs and their funding into the Mission Differentiation component of the SSCM. Detail on these programs and their funding may be found in the “Mission Differentiation Programs” section below. PUSF distributed outside of the SSCM in the 2015-17 biennium includes \$41,095,238 for the continuation of the tuition buy down funding originally provided to public universities in House Bill 5101 (2013 Special Session). Tuition buy down funds will be allocated in the same proportion as the settled-up FY15 HB 5101 tuition buy down allocation.¹⁵ The Final \$5,953,584 in PUSF is distributed in FY16 to the regional and technical universities for administrative services previously provided by the Oregon University System. Those services are purchased from the University Shared Services Enterprise. For FY17, shared services funding is provided as a line item within the Mission Differentiation component of the SSCM.

The following budget note was included in the HB 5024A budget report in reference to the PUSF¹⁶:

The additional \$30.0 million post-revenue forecast allocation for the biennium is to be used to fund campus investments in targeted tuition remissions for undergraduate Oregonians, and programs to improve student graduation. These would be programs detailed previously by the universities to the HECC for how they would use additional investments addressing access, affordability, and student success. The seven universities will commit to continuing these investments in both years of the biennium. The universities will report to HECC, and legislative committees, how they have invested the funds. All additional funds will flow through the Student Success and Completion Model (SSCM).

STUDENT SUCCESS AND COMPLETION MODEL (SSCM) Background

ORS 350.075(3)(iii)(f) tasked the HECC with the creation, in consultation with the state’s public universities, of funding allocation formulas and associated rules. Beginning in June 2014, the HECC convened a workgroup comprised of senior financial, academic, and student affairs administrators from each of the seven public universities, as well as faculty and student leadership, to develop an outcomes-based funding model to allocate the PUSF.

The SSCM is designed to comport with the following principles developed by that workgroup:

- Reflect HECC’s strategic plan and OEIB Equity Lens
- Focus on student access and success with an emphasis on underrepresented populations
- Encourage high demand/high reward degrees
- Recognize/reward differentiation in institutional mission and scope
- Use clearly defined, currently available data
- Maintain clarity and simplicity
- Utilize a phase-in period to ensure stability, beginning with 2015-17 biennium.

Supported by HECC staff, the workgroup examined outcomes-based funding models and reviewed relevant literature and best practices from other states to inform the creation of a model that meets Oregon’s unique institutional context. The iterative development process concluded in February 2015 and culminated in adoption of administrative rules by the HECC in April 2015, operationalizing the SSCM for implementation

¹⁵ Page 24 <<https://olis.leg.state.or.us/liz/2015R1/Downloads/MeasureAnalysisDocument/32421>>

¹⁶ Page 12 <<https://olis.leg.state.or.us/liz/2015R1/Downloads/MeasureAnalysisDocument/32142>>

in the 2016 fiscal year. In conjunction with the workgroup principles, a four-year phase in period will complete in the 2019 fiscal year.

SSCM Structure

The SSCM is comprised of three funding categories:

- **Mission Differentiation (MD) Funding** supports the unique regional, research and public service missions and activities of each university, as “line item” funding for services, programs or general operations. Descriptions of specific programs funded through MD are included in the pages that follow.
- **Activity-Based Funding** distributes resources based on student credit hour (SCH) completions of Oregon resident students at undergraduate and graduate levels.
- **Completion Funding** rewards degree and certificate completions by Oregon resident students. Completions by underrepresented students (underrepresented minority, low-income, rural and veteran status) and those in academic disciplines in high-demand and high-reward fields (STEM, Health, Bilingual Education) are provided additional resources by the allocation formula.

Public University Support Fund Summary: SSCM & Other Funding		
Funding Category	FY16 Total Funding (\$)	FY16 Total Funding (as % of PUSF)
Mission Differentiation (MD) Funding	\$54,836,131	16.8%
Activity Based Funding	\$195,610,132	60.0%
Completion Funding	\$48,902,533	15.0%
Non-SSCM Funding - University Shared Services Enterprise Funding	\$5,953,584	1.8%
Non-SSCM Funding - HB 5101 Tuition Buy Down Continuation	\$20,547,620	6.3%
Total	\$325,850,000	100.0%

Funding Category	Data	Calculation
<p align="center">Mission Differentiation (MD) Funding</p>	<ul style="list-style-type: none"> • Historical funding levels for MD line items • Dual Credit completions • SCH completions by CIP code (program area) and student level 	<ul style="list-style-type: none"> • Allocation is “off the top” • Most line items are based on historical funding levels and adjusted for inflation • Includes new line item funding related to governance transition, funding model and definitional changes • Includes SCH-based resources for Dual Credit completions • Engineering Technology Undergraduate, Engineering Graduate, and Regional University Support Adjustment line items are calculated based SCH completions
<p align="center">Activity Based Funding¹</p>	<ul style="list-style-type: none"> • SCH completions by CIP code (program area) and student level 	<ul style="list-style-type: none"> • A defined percentage of non-MD funding is distributed for SCH completions (40% of non-MD funding at full implementation) • Distributes resources based on SCH completions at each institution utilizing program- and course level-specific cost weighting system
<p align="center">Completion Funding¹</p>	<ul style="list-style-type: none"> • Degree and graduate certificate completions by level and CIP code • Completions by transfer status (BA/BS only) • Completions by underrepresented students <ul style="list-style-type: none"> - Low income student (Pell Grant recipient) - Underrepresented minority student - Rural student - Veteran student • Completions in priority, high-demand high-reward degree areas <ul style="list-style-type: none"> - STEM - Healthcare - Bilingual Education 	<ul style="list-style-type: none"> • Degrees at all levels are funded: BA/BS through PhD², including graduate certificates • Cost-weighting adjustments are made to reflect program duration and program area (CIP code) • Additional weighting awarded for BA/BS degrees earned by underrepresented students and degrees in high-demand and high-reward areas • Allocations for transfer students are discounted relative to non-transfer students

¹All data is three-year rolling average. ²PhDs awarded to non-resident students are treated as resident students.

Data components of the SSCM are collected, compiled, and reported by HECC Office of Research and Data in coordination with each university’s institutional research staff.

SSCM Transition Period

Three mechanisms are used to smooth the transition from the prior allocation model to the SSCM:

- **Stop Loss** – The Stop Loss mechanism prevents any institution from receiving less in current year allocations than a pre-determined percentage of the prior year. The Stop Loss threshold declines after the first year (FY16) until it is disengaged after year four (disengaged in FY20).
- **Stop Gain** – The Stop Gain mechanism prevents any institution from receiving more in current year allocations than a pre-determined percentage increase from the prior year. The Stop Gain threshold increases after the first year (FY16) until it is disengaged after year four (disengaged in FY20).
- **Phase In** – During the first year (FY16) 20% of all non-Mission Differentiation funding is based on degree and certificate completions. Completion funding increases by 20 percentage points for each of the subsequent two years until it accounts for 60% of all non-Mission Differentiation funding, at which point it remains stable. Remaining funding is based on student credit hour completions.

The transition mechanisms and transition period are summarized below.

Non-Mission Differentiation Funding Splits					
	FY16	FY17	FY18	FY19	FY20
Degree Completions	20%	40%	60%	60%	60%
Credit Hour Completions	80%	60%	40%	40%	40%
Stop Loss & Stop Gain Thresholds					
	FY16	FY17	FY18	FY19	FY20
Stop Loss ¹	4.5%	2.0%	1.0%	0.0%	Disengaged
Stop Gain ²	27.25%	37.25%	47.25%	57.25%	Disengaged

¹If the change in annual available PUSF is less than the reported Stop Loss thresholds, each institution's allocation will be proportionately adjusted.

²Stop Gain for FY18-FY19 is projected only. Stop Gain will be adjusted to 1.5 times the changes in PUSF (\$) appropriated by the legislature.

Approach to 2015-17 SSCM True Up and Funding Allocation Distribution

Allocated funds are distributed to institutions on a quarterly basis. While exceptions may exist periodically—especially among one-time appropriations where an institution may require a non-standard distribution schedule due to cash needs—the following funding distribution schedule is administered by the HECC:

Biennial PUSF Appropriation							
First Year 49% of Biennial Appropriation				Second Year 51% of Biennial Appropriation			
July Q1	October Q2	January Q3	April Q4	July Q5	October Q6	January Q7	April Q8
36% of First Year funds	24% of First Year funds	24% of First Year funds	16% of First Year funds	36% of Second Year funds	24% of Second Year funds	24% of Second Year funds	16% of Second Year funds
<i>Projected Data</i>	<i>Subject to Settle Up Processes</i>	<i>Final Data</i>	<i>Final Data</i>	<i>Projected Data</i>	<i>Subject to Settle Up Processes</i>	<i>Final Data</i>	<i>Final Data</i>

Due to the nature of data reporting, the SSCM requires a true-up during each fiscal year. Prior to the beginning of the fiscal year, a projected SSCM funding allocation is compiled using projected data. The projection process assumes current academic year enrollment and degree completion elements equal prior year data. For example, in FY16, the initial SSCM allocation projected 2014-15 data at 2013-14 levels for each institution. Using this preliminary allocation, the first quarterly funding distribution was made in July.

Final 2014-15 data became available in late September, allowing a true-up of the preliminary SSCM allocation by replacing the projected data with actuals. Additionally, under the FY15 funding formula, a year-end settle-up process took place annually. Because the SSCM relies on the prior year funding of each institution for Stop Loss and Stop Gain calculations, the initial FY16 SSCM allocation assumed a pre-settle-up level of FY15 funding for each institution. With the final FY15 settle-up complete, the true-up of the SSCM was able to incorporate an accurate final FY15 funding level for each institution. By incorporating the final data and final FY15 funding levels, the SSCM was finalized for the remaining three FY16 quarterly distributions.

Changes from the preliminary SSCM run to the final SSCM run are reflective of the following data and funding elements:

- Settle Up of FY15 Funding
 - Enrollment funding
 - Engineering Graduate funding
 - Engineering Technology Undergraduate funding
 - Regional University Support funding
- Finalization of 2014-15 Student Credit Hour data
- Finalization of 2014-15 Degree data
- Finalization of 2014-15 Dual Credit Student Credit Hour data
- Calculation of credit hour driven Mission Differentiation funding
 - Engineering Graduate funding
 - Engineering Technology Undergraduate funding
 - Regional University Support funding
- Settle Up of FY15 HB 5101 Tuition Buy Down funding

The allocation difference between the preliminary and final SSCM runs results in either over-distribution or under-distribution of funds in the first quarter distribution. These variances are corrected over the second quarter (October) and 3rd quarter (January) funding distributions, with 60% of the adjustment realized in the second quarter and 40% realized in the third quarter. A summary of FY16 allocation variances from the true up process is included in the appendices.

Mission Differentiation Programs

Mission Differentiation funding for most line items is based on the final FY15 funding allocation, with an adjustment for full year Portland CPI-U inflation (2.3% adjustment for FY16). Proportional allocation between institutions is frozen based on the FY15 allocation. There are four exceptions:

- Dual Credit – Funded at a baseline of \$50 per completed dual credit student credit hour in FY16. The per-credit hour funding will change with inflation in future fiscal years.
- Engineering Technology Undergraduate – Total funding available for all institutions is based on inflation-adjusted FY15 funding. Allocation between institutions is proportional to the number of completed undergraduate credit hours in Classification of Instructional Programs (CIP) code 15.
- Engineering Graduate - Total funding available for all institutions is based on inflation adjusted FY15 funding. Allocation between institutions is proportional to the number of completed graduate credit hours in Classification of Instructional Programs (CIP) code 14.
- Regional University Support - Total funding available for all institutions is based on inflation adjusted FY15 funding. Allocation between institutions is proportional to the number of student FTE that would be required to bring institutional enrollment to a threshold of 7,500 FTE. Four institutions and OSU-Cascades were eligible for funding in FY16. OSU-Cascades is funded at a 40% discount (60% funded rate) relative to the other eligible institutions, consistent with past practice.

All data used for these calculated Mission Differentiation items is a trailing three-year average, consistent with other areas of the SSCM. For all Mission Differentiation items, a decrease in PUSF from year-to-year, or an increase insufficient to keep pace with inflation, will result in adjustments other than inflation. For decreases, funding available for each MD line item will be decreased proportionally. For less-than-CPI increases, funding available for each line item will increase proportionally.

The table on the following page summarizes Mission Differentiation funding by line item for FY16 and is followed by brief descriptions of each Mission Differentiation line item.

FY16 Mission Differentiation Summary									
Category/Line Item	EOU	OIT	OSU	OSU-Cascades	PSU	SOU	UO	WOU	Total
Mission Category									
Law & Legal Studies (CIP 22)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 616,504	\$ -	\$ 616,504
Pharmacy (CIP 51.2)	\$ -	\$ -	\$ 1,058,883	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,058,883
Vet. Med (CIP 51.24)	\$ -	\$ -	\$ 3,533,941	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 3,533,941
Engineering Technology Undergraduate	\$ -	\$ 1,539,193	\$ -	\$ -	\$ 5,095	\$ -	\$ -	\$ 1,681	\$ 1,545,969
Engineering Graduate	\$ -	\$ 27,682	\$ 2,261,514	\$ -	\$ 666,915	\$ -	\$ -	\$ -	\$ 2,956,111
Collaborative OUS Nursing Program	\$ 22,556	\$ 13,240	\$ -	\$ -	\$ -	\$ 38,095	\$ -	\$ 25,007	\$ 98,898
Regional Solutions	\$ 13,393	\$ -	\$ -	\$ 13,393	\$ 13,393	\$ -	\$ 13,393	\$ -	\$ 53,572
Statewide Access	\$ -	\$ 849,747	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 849,747
Campus Public Service Programs	\$ 227,028	\$ -	\$ -	\$ -	\$ 584,020	\$ 101,285	\$ 553,539	\$ 1,560	\$ 1,467,432
Bldg. Maintenance / SWPS	\$ -	\$ -	\$ 1,825,871	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,825,871
Southwestern Oregon University Center (SOUC)	\$ 115,311	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 115,311
OCATE	\$ -	\$ -	\$ -	\$ -	\$ 596,275	\$ -	\$ -	\$ -	\$ 596,275
Oregon Wide-Area Education Network (OWEN)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 413,764	\$ -	\$ 413,764
Chancellor's Office Operations	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Systemwide Expenses / Programs	\$ 56,538	\$ 53,723	\$ 798,068	\$ -	\$ 244,798	\$ 129,703	\$ 711,414	\$ 151,018	\$ 2,145,262
Veterinary Diagnostic Lab	\$ -	\$ -	\$ 1,254,277	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,254,277
Health Professions Programs	\$ 282,380	\$ 2,316,076	\$ -	\$ -	\$ -	\$ 389,604	\$ -	\$ 315,009	\$ 3,303,069
PSU-NEW Leadership Oregon	\$ -	\$ -	\$ -	\$ -	\$ 66,974	\$ -	\$ -	\$ -	\$ 66,974
Rural Access	\$ 258,900	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 258,900
PSU-Oregon Biodiversity Information Center (prev Natural Heritage)	\$ -	\$ -	\$ -	\$ -	\$ 50,469	\$ -	\$ -	\$ -	\$ 50,469
OIT AA SCH adjustment beginning FY16	\$ -	\$ 204,600	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 204,600
Mission Category Total	\$ 976,106	\$ 5,004,261	\$ 10,732,554	\$ 13,393	\$ 2,227,939	\$ 658,687	\$ 2,308,614	\$ 494,275	\$ 22,415,829
Regional Support Category									
Regional University Support Adjustment	\$ 2,772,936	\$ 2,681,685	\$ -	\$ 2,101,778	\$ -	\$ 2,357,241	\$ -	\$ 1,801,877	\$ 11,715,517
Retrenchment	\$ 199,257	\$ 199,356	\$ -	\$ 132,892	\$ -	\$ 199,349	\$ -	\$ 199,313	\$ 930,167
Retention & Graduation	\$ 348,700	\$ 348,872	\$ -	\$ 232,560	\$ -	\$ 348,862	\$ -	\$ 348,797	\$ 1,627,791
Underpinning	\$ 348,700	\$ 348,872	\$ -	\$ 232,559	\$ -	\$ 348,862	\$ -	\$ 348,797	\$ 1,627,790
11-13 Regional Support1	\$ 808,314	\$ 808,314	\$ -	\$ -	\$ -	\$ 808,315	\$ -	\$ 808,314	\$ 3,233,257
Regional Access	\$ 867,661	\$ 373,554	\$ -	\$ -	\$ -	\$ 280,157	\$ -	\$ 93,371	\$ 1,614,743
IT Fifth Site/OCATE/Southwest Oregon/OWEN	\$ 489,014	\$ 489,014	\$ -	\$ -	\$ -	\$ 489,014	\$ -	\$ 489,014	\$ 1,956,056
EOU Resident/Fundable adjustment beginning FY16	\$ 2,037,161	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,037,161
Regional Support Category Total	\$ 7,871,743	\$ 5,249,667	\$ -	\$ 2,699,789	\$ -	\$ 4,831,800	\$ -	\$ 4,089,483	\$ 24,742,482
Research Category									
Sponsored Research	\$ 44,304	\$ 16,887	\$ 2,167,855	\$ -	\$ 359,442	\$ 33,771	\$ 1,067,154	\$ 127,322	\$ 3,816,735
Faculty Salaries - Research	\$ 39,892	\$ 66,522	\$ 605,906	\$ -	\$ 521,684	\$ 94,604	\$ 710,164	\$ 69,463	\$ 2,108,235
Research Category Total	\$ 84,196	\$ 83,409	\$ 2,773,761	\$ -	\$ 881,126	\$ 128,375	\$ 1,777,318	\$ 196,785	\$ 5,924,970
Research Category									
Dual Credit	\$ 242,467	\$ 177,600	\$ -	\$ -	\$ 811,550	\$ 521,233	\$ -	\$ -	\$ 1,752,850
Mission Differentiation Total	\$ 9,174,512	\$ 10,514,937	\$ 13,506,315	\$ 2,713,182	\$ 3,920,615	\$ 6,140,095	\$ 4,085,932	\$ 4,780,543	\$ 54,836,131

Mission Differentiation Program Descriptions:

Regional Support Programs:

Regional University Support Adjustment-

The Regional University Support Adjustment provides \$11,715,517 in FY16 as support for institutions that have fewer resident FTE than 7,500. The funds are distributed proportionally between EOU, OIT, SOU, WOU, and OSU-Cascades according to how far below the 7,500 FTE threshold each institution falls (OSU-Cascades receives a discounted proportion--60%--of funding). The average support per FTE (for each FTE required to reach 7,500) is approximately \$501 in FY16. The 60% funded rate is approximately \$301. The total funding available will change at the same rate as other Mission Differentiation items but the allocation of those funds will be recalculated each year, reflecting annual changes in FTE counts at the institutions.

Retrenchment, retention and graduation and underpinning-

Funding for these three programs was implemented in 2007-09 as a result of legislative support for the financial stability at regional campuses and to provide incentives for retention and graduation at those institutions. The retention and graduation component was introduced to provide resources and incentives for campuses to develop and begin implementing plans to achieve improvements. The intent was to move towards allocations based on realized achievement improvements.

Continuation of 2011-13 Regional Support-

This program continues supplemental appropriations for the four Technical and Regional Universities (TRUs¹⁷). The supplemental appropriations were first established in the 2011-13 biennium.

Regional Access-

This program provides core support for regional institutions with small enrollment bases to ensure geographic access to public higher education for all Oregonians.

EOU Supplemental Support (Fundable FTE Supplement)-

Under the now-retired RAM funding system, all students at EOU were considered “fundable,” which meant enrollment-based state support was earned by both resident and non-resident student credit hour completions. Because the SSCM only provides funding based on resident student achievement and completions, EOU would have lost a substantial amount of its share of state funding. The EOU Supplemental Support Mission Differentiation line provides additional state funding to offset what otherwise would be lost in the transition of data from the “fundable” basis to the “resident only” basis. The funding will continue in future years and receive the same inflationary adjustments as other Mission Differentiation line items.

TRU Shared Services (Including IT Fifth Site¹⁸)-

This program provides funding to the TRUs to support their increased costs as a result of the new University Shared Services Enterprise (USSE) that replaced much of the shared services that had been provided by the OUS Chancellor’s Office. For FY16, TRU Shared Services funds are allocated after any Stop Loss or Stop Gain allocations for Fiscal Year 2016 only. Thereafter, TRU Shared Services are allocated within the Mission Differentiation Allocation and shall change by the same rule as other Mission Differentiation line items in the SSCM. Under HB 2611B (2015), the USSE will exist in its current form until at least July 1, 2019, with the exception of risk management services, which may be provided by individual campuses instead of the USSE if the campuses so choose.

Research Support Programs:

¹⁷ The Four TRUs are Eastern Oregon University, Oregon Institute of Technology, Southern Oregon University and Western Oregon University. OSU-Cascades is considered a TRU for some funding purposes but not others (such as shared services).

¹⁸ <<https://usse-oregon.org/>>

Sponsored Research-

This program provides support for research as an incentive to attract additional sponsored research to the campuses. Support levels were calculated in 1996-97 based on 4% of sponsored research expenditures. Subsequent to 1996-97, funding levels were based on this initial allocation, inflation, and legislative cuts.

Faculty Salaries-Research-

This program provides additional research support to institutions on the basis of instructional faculty salary, specifically, 3% of faculty salaries at OSU, PSU and UO, and 2% of faculty salaries at EOU, OIT, SOU, and WOU in 1996-97. Subsequent to 1996-97, funding levels were based on this initial allocation, inflation, and legislative cuts.

Mission Support Programs:

Campus Public Service Programs-

This program provides omnibus funding for campus public service program operations at all seven public universities. The HECC does not specify the distribution of funds between each institution's Campus Public Service Programs.

Regional Solutions Centers¹⁹-

Beginning in FY2013, this program provides support to those universities (EOU, OSU-Cascades, PSU, and UO) that offered to house the Governor's Regional Solutions Centers on their campuses and is intended to offset administrative and space costs associated with hosting these offices.

Oregon Biodiversity Information Center at PSU²⁰-

The Oregon Biodiversity Information Center (ORBIC) is part of the Institute for Natural Resources (INOR) and is based at Portland State University. ORBIC leads INR's biodiversity and conservation work; and its key function is to maintain, develop and distribute biodiversity information in Oregon. The center works with partners across the region to provide the most comprehensive information on plants, wildlife, fish, fungi, and vegetation communities throughout Oregon. ORBIC houses information including the most comprehensive database of rare, threatened and endangered species of Oregon. ORBIC was originally formed by the Oregon Legislature in 1979 as the Oregon Natural Heritage Program.

PSU-New Leadership Oregon²¹-

The National Education for Women's (NEW) Leadership of Oregon program is an award-winning women's leadership development program housed at the Center for Women, Politics & Policy at Portland State University (PSU). NEW Leadership Oregon's goal is to develop an inclusive women-centered leadership program that will educate and encourage outstanding college women to develop career paths in politics and public service.

Health Professions Programs-

Funding is provided to increase nursing pre-requisite courses for the Oregon Consortium for Nursing Education (OCNE) program and to expand the OIT health professions programs. The program funds are managed by OIT and distributed to the various campuses to support specific program objectives.

Rural Access-

¹⁹ <<http://www.oregon.gov/gov/admin/regional-solutions/Pages/default.aspx>>

²⁰ <<http://orbic.pdx.edu/>>

²¹ <<http://www.pdx.edu/womens-leadership/new-leadership-oregon>>

This EOU-based program seeks to create, develop, and encourage a college-going culture in rural Oregon to increase the percentage of high school graduates attending college to the state average, resulting in an increased investment in economic development in the region and an increased regional and state tax base.

*Veterinary Diagnostic Laboratory*²²-

The OSU Veterinary Diagnostic Laboratory is a public-supported facility providing a full range of animal disease diagnostic services to veterinarians, livestock producers, pet owners, and biomedical researchers. In addition to diagnostic services, the Laboratory shares in the training of future veterinarians through instruction of veterinary medical students in the practice of diagnostic medicine.

Building Maintenance, Statewide Public Service Facilities-

This program provides funds for OSU to operate and maintain Statewide Public Service facilities (related to all three SWPS programs) on its Corvallis campus.

*Southwestern Oregon University Center*²³-

The Southwestern Oregon University Center (SOUC) is an EOU and community college collaboration that offers a selection of undergraduate and graduate degree programs on the campus of Southwestern Oregon Community College (SWOCC) in Coos Bay. The collaboration allows students the opportunity to get a degree from an Oregon university while living in Coos Bay. The SOUC provides advising for all of Oregon's state universities and on-site representatives from Eastern Oregon University and Linfield College.

OCATE/Engineering-

The Oregon State Board of Higher Education formed the Oregon Center for Advanced Technology Education (OCATE) in April 1985 with \$1 million from state lottery funds. OCATE offered programs in engineering education in partnership with Oregon universities. Currently, funding enables employees of the high technology economic sector of Washington County to take graduate courses at Portland State University's Maseeh College of Engineering and Computer Science.

*Oregon Wide-Area Education Network*²⁴-

The Oregon Wide-Area Education Network (OWEN) is a collaboration of three state computer networks to realize cost savings by sharing bandwidth and access to Internet providers and is hosted at UO. The three networks include the Network for Education and Research (NERO) network, the Oregon Department of Administrative Services (DAS) network, and the Oregon Public Education Network (OPEN), the state's K-12 network.

Statewide Assessments at System Level, Legal,, etc.-

Funding is intended to cover certain assessments by the State of Oregon. Universities were exempted from certain (but not all) state assessments beginning July 1, 2012. Additionally, funding may also be used to provide endowment matches, funds for faculty diversity, funds for students with disabilities and funding for the ORBIS library consortium.

Collaborative Nursing Program-

Funding is provided to support EOU, OIT, SOU, and WOU for hosting OHSU nursing students. OHSU receives the tuition dollars for the nursing courses taught on the regional campuses. This supplement supports the cost of providing common services to the students.

Engineering Technology Undergraduate-

²² <<http://vetmed.oregonstate.edu/diagnostic>>

²³ <<https://www.eou.edu/coosbay/>>

²⁴ <<http://www.nero.net/OREGON/internetnetwork/>>

In order to account for the increased cost of engineering programs, funds are allocated to OIT/PSU in order to support the undergraduate engineering programs. Funding is determined by multiplying the calculated rate by resident FTE per campus in CIP 15 (Engineering Technologies). The funds available for this line item are adjusted each year in the same manner as other Mission Differentiation components; however, the distribution of those funds between institutions is determined by an annual calculation.

Engineering Technology Graduate-

In order to account for the increased cost of engineering graduate programs, funds are allocated to OIT/OSU/PSU in order to support their graduate engineering programs. Funding is determined by multiplying the calculated rate by resident FTE per campus in CIP 14 (Engineering). The funds available for this line item are adjusted each year in the same manner as other Mission Differentiation components; however, the distribution of those funds between institutions is determined by an annual calculation.

UO Law Underpinning

Underpinning funding is provided to the University of Oregon Law School, Oregon's only public law school. This line item did not exist as part of the RAM but is included in the SSCM to provide a stable base of funding for the UO Law program to buoy it from funding inconsistencies that otherwise may be caused by positive and negative enrollment spikes. UO Law student credit hour completions and degree completions will continue to earn additional resources through the SSCM, but at a reduced rate. The baseline underpinning funding is based on an assessment of recent enrollment and funding for the UO Law program. Funding available as Law Underpinning will be adjusted each year in a similar manner to other Mission Differentiation components.

OSU Pharmacy Underpinning

Underpinning funding is provided to OSU as support for its Pharmacy program. This line item did not exist as part of the RAM but is included in the SSCM to provide a stable base of funding for the Pharmacy program to buoy it from funding inconsistencies that otherwise may be caused by positive and negative enrollment spikes. Pharmacy student credit hour completions and degree completions will continue to earn additional resources through the SSCM, but at a reduced rate. The baseline underpinning funding is based on an assessment of recent enrollment and funding for the Pharmacy program. Funding available as Pharmacy Underpinning will be adjusted each year in a similar manner to other Mission Differentiation components.

OSU Veterinary Medicine Underpinning

Underpinning funding is provided to OSU as support for its Veterinary Medicine program. This line item did not exist as part of the RAM but is included in the SSCM to provide a stable base of funding for the Veterinary Medicine program to buoy it from funding inconsistencies that otherwise may be caused by positive and negative enrollment spikes. Veterinary Medicine student credit hour completions and degree completions will continue to earn additional resources through the SSCM, but at a reduced rate. The baseline underpinning funding is based on an assessment of recent enrollment and funding for the Veterinary Medicine program. Funding available as Veterinary Medicine Underpinning will be adjusted each year in a similar manner to other Mission Differentiation components.

OIT Terminal Health Programs Underpinning

Underpinning funding is provided to OIT as support for non-Bachelor's degree awarding health programs of study. This line item did not exist as part of the RAM but was inherent in its enrollment-based funding mechanism. With the transition to the SSCM, programs offering less-than-4-year degrees do not earn SSCM funding. Providing Mission Differentiation funding ensures that these health programs that terminate with less than a Bachelor's degree continue to be offered by OIT to the benefit of the citizens of the region. The baseline underpinning funding is based on an assessment of recent enrollment and completions in these health programs.

Statewide Access

Statewide Access provides state support in recognition of the technology education at OIT. The original allocation was made in 2001-03 and held constant for four years. Beginning in 2005-07 this program was subject to inflation and legislative adjustments.

Non-PUSF Funding

State Programs:

In addition to continuing state programs, any additional one-time or legislatively directed funding outside of the regular budget flows through the state programs area. However, it should be noted that institutional funds from non-state sources will flow directly to the institutions and are generally not subject to review by the HECC unless specified in state law. Therefore, unless otherwise noted, this document reports only state funding for state programs.

Public University State Programs - FY16								
Program	EOU	OIT	OSU Total	PSU	SOU	UO	WOU	Total
Engineering Technology Sustaining Funds	\$ 155,415	\$ 958,007	\$ 7,041,394	\$ 3,182,007	\$ 236,135	\$ 107,892	\$ 300,273	\$ 11,981,123
Dispute Resolution	\$ -	\$ -	\$ -	\$ 431,519	\$ -	\$ 801,394	\$ -	\$ 1,232,913
Oregon Solutions	\$ -	\$ -	\$ -	\$ 1,106,151	\$ -	\$ -	\$ -	\$ 1,106,151
OSU Fermentation Science	\$ -	\$ -	\$ 607,404	\$ -	\$ -	\$ -	\$ -	\$ 607,404
Signature Research	\$ -	\$ -	\$ 242,195	\$ 25,494	\$ -	\$ 242,194	\$ -	\$ 509,883
Labor Education Research Center	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 332,487	\$ -	\$ 332,487
OSU Ocean Vessels Research	\$ -	\$ -	\$ 303,701	\$ -	\$ -	\$ -	\$ -	\$ 303,701
Population Research Center	\$ -	\$ -	\$ -	\$ 213,303	\$ -	\$ -	\$ -	\$ 213,303
Institute for Natural Resources	\$ -	\$ -	\$ 195,560	\$ -	\$ -	\$ -	\$ -	\$ 195,560
Clinical Legal Education	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 170,558	\$ -	\$ 170,558
Oregon Climate Change Research Institute	\$ -	\$ -	\$ 153,290	\$ -	\$ -	\$ -	\$ -	\$ 153,290
OSU Advanced Wood Products (w/UO)	\$ -	\$ -	\$ 1,225,000	\$ -	\$ -	\$ -	\$ -	\$ 1,225,000
Total State Programs	\$ 155,415	\$ 958,007	\$ 9,768,544	\$ 4,958,474	\$ 236,135	\$ 1,654,525	\$ 300,273	\$ 18,031,373

Engineering Technology Sustaining Funds-

As part of the transition from OUS to the HECC, what had been the Engineering and Technology Industry Council’s (ETIC) Sustaining Funds (80% of its prior biennium funding) transitioned to the HECC. These sustaining funds are intended to focus on the following three principles:

1. Provide stability and sustaining the progress which has been made by utilizing ETIC funding and meeting the productivity and outcomes historically examined by ETIC; particularly engineering and technology related graduates at the undergraduate and graduate levels, externally funded research and industry investment.
2. Provide a tactical linkage of engineering and technology programs to the labor force needs of Oregon industry by dedicating a portion of current funding levels and funding growth on that linkage.
3. Encourage and deepen connections between universities and engineering and technology industry partners, and collectively advocating for additional private and public investment.

In furtherance of these three principles, the HECC convened a workgroup of representatives from four of the seven universities and OHSU and came up with the following allocation formula for the 2015-17 biennium²⁵. The funding formula for the upcoming fiscal year is as follows:

- a. 80% of funds will go to “Historical Funding,” which will be based on the proportional share of FY 15 Sustaining Funding levels. These funds will be held constant in future years and used a base provided institutions maintain adequate performance.
- b. 20% will go to “Outcomes Funding,” which will be based on the proportional share of funding as recommended by the “Oregon Students, Oregon Jobs” employment-based funding model proposed by

²⁵ Codified as OAR 715-013-0062.

ETIC. Oregon Students, Oregon Jobs allocates funds based on the employment and wage rate of resident graduates employed in Oregon.

For FY17, this FY16 funding level will serve as a base and any additional funds (estimated to be \$489,206) will be distributed to institutions who are below where their funding level should be based on the Oregon Students, Oregon Jobs model. The HECC will convene a workgroup to establish a long-term allocation formula, with an expected completion date in 2016.

Clinical Legal Education-

This program provides funding to any accredited public or private institution of higher education within Oregon which provides clinical legal services to victims of domestic violence, stalking or sexual assault. Distribution of the funds is on an application basis. OAR 715-013-0060 has been adopted to assist with establishing the eligibility for and distribution of these funds. It is anticipated that the University of Oregon will receive all funds for this program for the upcoming biennium as they are the only eligible institution. Lewis and Clark had previously been eligible but no longer offers eligible clinic services.

Oregon Solutions²⁶-

Oregon Solutions at Portland State University brings together local groups to solve local problems using sustainable methods. The program promotes collaborative efforts between government agencies, commercial businesses, and nonprofit organizations in support of Oregon's economy, environment, and communities.

Dispute Resolution-

The UO administers the Oregon Office for Community Dispute Resolution²⁷ (OOCDR) which provides mediation services and conflict resolution training to private parties. PSU administers the Oregon Consensus²⁸ program, within the National Policy Consensus Center, to mediate disputes involving public bodies or public lands. Funding is allocated between UO and PSU on a 65%/35% by agreement of by both campuses. OAR 715-013-0066 has been adopted to allocate these funds.

Oregon Climate Change Research Institute²⁹-

The Oregon Climate Change Research Institute (OCCRI) facilitates research, serves as a climate change information clearinghouse, provides technical assistance, and at least once each biennium, assesses the state of climate change science as it relates to impacts on Oregon. OCCRI is housed within the OSU College of Oceanic and Atmospheric Sciences (COAS).

Signature Research-

The signature research program was initiated by the legislature in 2003 with funding to support the development of Signature Research Centers for Multi-Scale Materials and Devices at OSU, UO and PSU, and on using nanotechnology to develop products with commercial applications. The overall mission of the initiative is to create high-wage jobs and quality economic development in the state. UO and OSU each receive 47.5% of the available funds and PSU receives the remaining 5%. OAR 715-013-0064 has been adopted to allocate these funds.

Institute for Natural Resources³⁰-

The Institute for Natural Resources (INR) at Oregon State University is a cooperative enterprise bringing the scientific knowledge and expertise of Oregon's public universities and other Oregon higher education institutions to bear on natural resource management.

Labor Education Research Center³¹-

²⁶ <<http://orsolutions.org/>>

²⁷ <<https://law.uoregon.edu/explore/OOCDR>>

²⁸ <<http://oregonconsensus.org/>>

²⁹ <<http://occri.net/>>

³⁰ <<http://oregonstate.edu/inr/>>

³¹ <<http://lerc.uoregon.edu/>>

The Labor Education and Research Center (LERC) at the University of Oregon was established in 1977 in order to give workers and labor unions in Oregon access to the resources and expertise of the state's higher education system.

Population Research Center (PRC)³²-

The mission of PRC, located at Portland State University, is to provide population data, information, and research analysis for Oregon and its communities. In addition, it has the responsibility of acting as lead state agency in working with the U.S. Census Bureau to disseminate information at local levels.

OSU Fermentation Science-

This funding was intended to "expand fermentation science programs at Oregon State University." Fermentation science funding supports Oregon's fast-growing beer, wine and spirits industries and is one of the only programs of its type in the country.

OSU Ocean Vessels Research³³-

The 2013 Legislature established the new Oceangoing Research Vessel Program at Oregon State University to conduct specified marine research activities using U.S. National Science Foundation (NSF) research vessels currently stationed in Oregon. The appropriation for the upcoming biennium funds 20 days of ship use during the biennium, including fuel, supplies and labor.

Oregon Metals Initiative-

The Oregon Metals Initiative was transferred to the Oregon Business Development Department (OBDD) as part of the HB 5024A budget.

Statewide Public Service Programs:

Funding for the statewide public service programs (SWPS) is provided in HB 5024A. These programs, all housed at Oregon State University, play a vital role throughout the state of Oregon, particularly in rural areas and in relation to natural resource industries or key environmental issues. Traditionally, funding for these has only increased at the CSL level; however, the legislature chose to provide an additional \$14 million on top of the CSL to the SWPS programs for the 2015-17 biennium.

³² <<http://www.pdx.edu/prc/home>>

³³ <<https://ceoas.oregonstate.edu/ships/>>

**Statewide Public Service Programs
Summary of 2015-16 Revenue Estimates**

	Agriculture Experiment Station	Extension Service	Forest Research Laboratory
HB 5024 State General Fund	\$ 63,121,066	\$ 45,601,540	\$ 9,771,107
Federal Revenues	\$ 4,516,108	\$ 4,230,822	\$ 1,131,671
County Appropriations	\$ 505,304	\$ 10,704,340	\$ -
State Agency Transfers In	\$ -	\$ -	\$ 3,431,700
Sales and Services	\$ 1,709,453	\$ 1,217,251	\$ -
Interest Income	\$ -	\$ -	\$ -
Donations (Non-Governmental)	\$ -	\$ -	\$ -
Grants (Non-Federal)	\$ -	\$ -	\$ -
Other Revenues	\$ -	\$ 178,574	\$ -
Transfers-In	\$ -	\$ -	\$ -
Total: State General Fund	\$ 63,121,066	\$ 45,601,540	\$ 9,771,107
Total: Other Funds	\$6,730,865	\$16,330,987	\$4,563,371
Total Revenues	\$ 69,851,931	\$ 61,932,527	\$ 14,334,478

As a condition of this additional funding, HB 5024A's budget report contains the following budget note for all three SWPS programs³⁴:

Oregon State University shall provide a report to the Legislative Assembly for consideration during the 2016 legislative session regarding the implementation of programs and activities enabled by the \$14.0 million funding increase for the Statewide Public Service Programs – the Agricultural Experiment Station, the Extension Service, and the Forest Research Laboratory. This report should identify the progress made in hiring additional staff and researchers, and the various activities undertaken and planned for the remainder of the 2015-17 biennium and into the future.

Sports Lottery:

Sports Lottery resources are provided to support athletic programs and student scholarships. As outlined in ORS 461.543, 88% of all available funding shall be spent to fund athletic programs, of which 70% shall be for nonrevenue producing sports, 30% for revenue producing sports and at least 50% for women's athletics. The remaining 12% of funding shall be spent on scholarships, equally divided between scholarships based on merit and those based on financial need.

³⁴ Ibid Page 13.

Sports Lottery			
	FY16	FY17	2015-17 Biennium
EOU	\$ 456,619	\$ 456,620	\$ 913,239
OIT	\$ 456,619	\$ 456,620	\$ 913,239
OSU	\$ 515,000.00	\$ 515,000	\$1,030,000
OSU	\$ 515,000	\$ 515,000	\$1,030,000
PSU	\$ 1,138,783	\$ 1,138,784	\$2,277,567
SOU	\$ 456,619	\$ 456,620	\$ 913,239
UO	\$ 515,000	\$ 515,000	\$1,030,000
WOU	\$ 581,358	\$ 581,358	\$1,162,716
Total	\$ 4,119,998	\$ 4,120,002	\$8,240,000

Fiscal Year 2015-16 Summary:

The following table aggregates and summarizes FY16 general fund resources for institution operations, state programs, statewide public services, and one-time appropriation items. A similar table for the 2015-17 biennium is also provided

2015-16 Detail Allocation Table (Post True-Up) - Page 1 of 2

	EOU	OIT	OSU	OSU-Cascades	PSU	SOU	UO	WOU	Total: Institutions	Other	Statewide Public Services	Total
<i>Public University Support Fund</i>												
Student Success and Completion Model (SSCM)												
Mission Differentiation												
Regional Support Programs	\$ 7,871,743	\$ 5,249,667	\$ -	\$ 2,699,789	\$ -	\$ 4,831,800	\$ -	\$ 4,089,483	\$ 24,742,482	\$ -	\$ -	\$ 24,742,482
Mission Support Programs	\$ 976,106	\$ 5,004,261	\$ 10,732,554	\$ 13,393	\$ 2,227,939	\$ 658,687	\$ 2,308,614	\$ 494,275	\$ 22,415,829	\$ -	\$ -	\$ 22,415,829
Research Programs	\$ 84,196	\$ 83,409	\$ 2,773,761	\$ -	\$ 881,126	\$ 128,375	\$ 1,777,318	\$ 196,785	\$ 5,924,970	\$ -	\$ -	\$ 5,924,970
Dual Credit completions	\$ 242,467	\$ 177,600	\$ -	\$ -	\$ 811,550	\$ 521,233	\$ -	\$ -	\$ 1,752,850	\$ -	\$ -	\$ 1,752,850
Total MD	\$ 9,174,512	\$ 10,514,937	\$ 13,506,315	\$ 2,713,182	\$ 3,920,615	\$ 6,140,095	\$ 4,085,932	\$ 4,780,543	\$ 54,836,131	\$ -	\$ -	\$ 54,836,131
Activity Based Allocation (Student Credit Hour completions)												
Lower Division Undergraduate SCH	\$ 1,548,151	\$ 1,720,244	\$ 13,896,659	\$ 43,598	\$ 8,372,996	\$ 2,305,276	\$ 9,821,055	\$ 3,712,049	\$ 41,420,028	\$ -	\$ -	\$ 41,420,028
Upper Division Undergraduate SCH	\$ 4,085,005	\$ 6,467,042	\$ 32,640,383	\$ 1,268,769	\$ 35,866,953	\$ 5,576,251	\$ 23,147,194	\$ 7,503,975	\$ 116,555,572	\$ -	\$ -	\$ 116,555,572
Masters/Graduate Certificates/ Professional SCH	\$ 458,636	\$ 53,082	\$ 5,678,475	\$ 341,522	\$ 7,750,900	\$ 908,575	\$ 3,037,145	\$ 994,496	\$ 19,222,831	\$ -	\$ -	\$ 19,222,831
PhD SCH	\$ -	\$ -	\$ 8,844,409	\$ -	\$ 2,213,393	\$ -	\$ 7,353,900	\$ -	\$ 18,411,702	\$ -	\$ -	\$ 18,411,702
Total Activity Based Allocation	\$ 6,091,792	\$ 8,240,368	\$ 61,059,926	\$ 1,653,889	\$ 54,204,242	\$ 8,790,102	\$ 43,359,294	\$ 12,210,520	\$ 195,610,133	\$ -	\$ -	\$ 195,610,133
Outcomes Based Allocation (Degree completions)												
Non-transfer Undergraduate completions	\$ 629,008	\$ 1,053,954	\$ 8,262,682	\$ 164,975	\$ 5,752,865	\$ 1,058,699	\$ 6,229,097	\$ 1,463,404	\$ 24,614,684	\$ -	\$ -	\$ 24,614,684
Transfer Undergraduate completions	\$ 428,972	\$ 445,937	\$ 1,453,444	\$ 251,861	\$ 2,937,531	\$ 312,115	\$ 1,021,070	\$ 524,492	\$ 7,375,422	\$ -	\$ -	\$ 7,375,422
Masters completions	\$ 99,099	\$ 12,141	\$ 627,888	\$ 77,932	\$ 1,983,016	\$ 219,677	\$ 626,789	\$ 249,390	\$ 3,895,932	\$ -	\$ -	\$ 3,895,932
Graduate Certificate completions	\$ -	\$ -	\$ 998,512	\$ -	\$ 383,077	\$ -	\$ 800,220	\$ -	\$ 2,181,809	\$ -	\$ -	\$ 2,181,809
Professional completions	\$ -	\$ -	\$ 297,932	\$ -	\$ -	\$ -	\$ 85,148	\$ -	\$ 383,080	\$ -	\$ -	\$ 383,080
PhD completions	\$ 20,974	\$ -	\$ 53,158	\$ 8,082	\$ 150,373	\$ 61,536	\$ 57,532	\$ 35,887	\$ 387,542	\$ -	\$ -	\$ 387,542
High Priority completions bonus (STEM, Health, Bilingual Certificates)	\$ 13,466	\$ 267,322	\$ 1,010,794	\$ 11,410	\$ 661,473	\$ 34,117	\$ 323,629	\$ 68,427	\$ 2,390,638	\$ -	\$ -	\$ 2,390,638
Targeted Student Populations bonus (Pell recipient, Rural, Underrepresented Minority, Veteran)	\$ 345,240	\$ 324,350	\$ 1,948,829	\$ 99,978	\$ 2,413,725	\$ 385,808	\$ 1,589,940	\$ 565,556	\$ 7,673,426	\$ -	\$ -	\$ 7,673,426
Total Outcomes Based Allocation	\$ 1,536,759	\$ 2,103,704	\$ 14,653,239	\$ 614,238	\$ 14,282,060	\$ 2,071,952	\$ 10,733,425	\$ 2,907,156	\$ 48,902,533	\$ -	\$ -	\$ 48,902,533
Stop Loss/Stop Gain Adjustment	\$ 101,935	\$ 109,310	\$ 410,711	\$ 12,304	\$ (822,492)	\$ 80,976	\$ 98,887	\$ 8,369	\$ -	\$ -	\$ -	\$ -
Total Student Success and Completion Model	\$ 16,904,998	\$ 20,968,319	\$ 89,630,191	\$ 4,993,613	\$ 71,584,425	\$ 17,083,125	\$ 58,277,538	\$ 19,906,588	\$ 299,348,797	\$ -	\$ -	\$ 299,348,797
Non-SSCM PUSF												
University Shared Services Enterprise (USSE)	\$ 1,489,522	\$ 1,521,622	\$ -	\$ -	\$ -	\$ 1,681,992	\$ -	\$ 1,260,448	\$ 5,953,584	\$ -	\$ -	\$ 5,953,584
Tuition Buy Down (HB 5101 continuation)	\$ 701,552	\$ 1,192,656	\$ 6,671,675	\$ 209,924	\$ 4,773,094	\$ 1,498,203	\$ 4,381,193	\$ 1,119,323	\$ 20,547,620	\$ -	\$ -	\$ 20,547,620
Total Non-SSCM PUSF	\$ 2,191,074	\$ 2,714,278	\$ 6,671,675	\$ 209,924	\$ 4,773,094	\$ 3,180,195	\$ 4,381,193	\$ 2,379,771	\$ 26,501,204	\$ -	\$ -	\$ 26,501,204
Total Public University Support Fund	\$ 19,096,072	\$ 23,682,597	\$ 96,301,866	\$ 5,203,537	\$ 76,357,519	\$ 20,263,320	\$ 62,658,731	\$ 22,286,359	\$ 325,850,001	\$ -	\$ -	\$ 325,850,001

2015-16 Detail Allocation Table (Post True-Up) - Page 2 of 2

	EOU	OIT	OSU	OSU-Cascades	PSU	SOU	UO	WOU	Total: Institutions	Other	Statewide Public Services	Total
<i>Non-PUSF General Fund Support</i>												
State Programs												
Engineering Technology Sustaining Funds	\$ 155,415	\$ 958,007	\$ 7,041,394	\$ -	\$ 3,182,007	\$ 236,135	\$ 107,892	\$ 300,273	\$ 11,981,123	\$ -	\$ -	\$ 11,981,123
Dispute Resolution	\$ -	\$ -	\$ -	\$ -	\$ 431,519	\$ -	\$ 801,394	\$ -	\$ 1,232,913	\$ -	\$ -	\$ 1,232,913
Oregon Solutions	\$ -	\$ -	\$ -	\$ -	\$ 1,106,151	\$ -	\$ -	\$ -	\$ 1,106,151	\$ -	\$ -	\$ 1,106,151
OSU Fermentation Science	\$ -	\$ -	\$ 607,404	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 607,404	\$ -	\$ -	\$ 607,404
Signature Research	\$ -	\$ -	\$ 242,194	\$ -	\$ 25,494	\$ -	\$ 242,194	\$ -	\$ 509,882	\$ -	\$ -	\$ 509,882
Labor Education Research Center	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 332,487	\$ -	\$ 332,487	\$ -	\$ -	\$ 332,487
OSU Ocean Vessels Research	\$ -	\$ -	\$ 303,702	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 303,702	\$ -	\$ -	\$ 303,702
Population Research Center	\$ -	\$ -	\$ -	\$ -	\$ 213,303	\$ -	\$ -	\$ -	\$ 213,303	\$ -	\$ -	\$ 213,303
Institute for Natural Resources	\$ -	\$ -	\$ 195,560	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 195,560	\$ -	\$ -	\$ 195,560
Clinical Legal Education	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 170,558	\$ -	\$ 170,558	\$ -	\$ -	\$ 170,558
Oregon Climate Change Research Institute	\$ -	\$ -	\$ 153,290	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 153,290	\$ -	\$ -	\$ 153,290
OSU Advanced Wood Products (w/UO)	\$ -	\$ -	\$ 1,225,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,225,000	\$ -	\$ -	\$ 1,225,000
Total State Programs	\$ 155,415	\$ 958,007	\$ 9,768,544	\$ -	\$ 4,958,474	\$ 236,135	\$ 1,654,525	\$ 300,273	\$ 18,031,373	\$ -	\$ -	\$ 18,031,373
Statewide Public Services												
Ag. Experiment Station	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 30,929,322	\$ 30,929,322
OSU Extension Service	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 22,344,755	\$ 22,344,755
OSU Forest Research	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 4,787,842	\$ 4,787,842
Total Statewide Public Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 58,061,919	\$ 58,061,919
One-time												
HB 2209 OSU Ocean acidification/Shellfish	\$ -	\$ -	\$ 245,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 245,000	\$ -	\$ -	\$ 245,000
SB 202 OSU INR Task Force Support	\$ -	\$ -	\$ 87,125	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 87,125	\$ -	\$ -	\$ 87,125
SB 5507 EOU Wrestling Program	\$ 67,032	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 67,032	\$ -	\$ -	\$ 67,032
SB 5507 PSU Oregon Solutions Task Force	\$ -	\$ -	\$ -	\$ -	\$ 30,527	\$ -	\$ -	\$ -	\$ 30,527	\$ -	\$ -	\$ 30,527
HB 2998 PSU Western Juniper	\$ -	\$ -	\$ -	\$ -	\$ 100,000	\$ -	\$ -	\$ -	\$ 100,000	\$ -	\$ -	\$ 100,000
HB 2002 PSU Profiling Study	\$ -	\$ -	\$ -	\$ -	\$ 122,711	\$ -	\$ -	\$ -	\$ 122,711	\$ -	\$ -	\$ 122,711
Total One-time	\$ 67,032	\$ -	\$ 332,125	\$ -	\$ 253,238	\$ -	\$ -	\$ -	\$ 652,395	\$ -	\$ -	\$ 652,395
Debt Service												
	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<i>Total Non-PUSF General Fund Support</i>	<i>\$ 222,447</i>	<i>\$ 958,007</i>	<i>\$ 10,100,669</i>	<i>\$ -</i>	<i>\$ 5,211,712</i>	<i>\$ 236,135</i>	<i>\$ 1,654,525</i>	<i>\$ 300,273</i>	<i>\$ 18,683,768</i>	<i>\$ -</i>	<i>\$ 58,061,919</i>	<i>\$ 76,745,687</i>
Total State General Fund Allocation	\$ 19,318,519	\$ 24,640,604	\$ 164,464,454	\$ 5,203,537	\$ 81,569,231	\$ 20,499,455	\$ 64,313,256	\$ 22,586,632	\$ 344,533,769	\$ -	\$ 58,061,919	\$ 402,595,688

2015-17 Detail Allocation Table (Projected) - Page 1 of 2

	EOU	OIT	OSU	OSU-Cascades	PSU	SOU	UO	WOU	Total: Institutions	Other	Statewide Public Services	Total
<i>Public University Support Fund</i>												
Student Success and Completion Model (SSCM)												
Mission Differentiation												
Regional Support Programs	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Mission Support Programs	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Research Programs	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Dual Credit completions	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total MD	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 117,061,794	\$ -	\$ -	\$ 117,061,794
Activity Based Allocation (Student Credit Hour completions)												
Lower Division Undergraduate SCH	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Upper Division Undergraduate SCH	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Masters/Graduate Certificates/ Professional SCH	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
PhD SCH	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Activity Based Allocation	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 349,436,163	\$ -	\$ -	\$ 349,436,163
Outcomes Based Allocation (Degree completions)												
Non-transfer Undergraduate completions	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Transfer Undergraduate completions	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Masters completions	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Graduate Certificate completions	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Professional completions	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
PhD completions	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
High Priority completions bonus (STEM, Health, Bilingual Certificates)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Targeted Student Populations bonus (Pell recipient, Rural, Underrepresented Minority, Veteran)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Outcomes Based Allocation	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 151,453,221	\$ -	\$ -	\$ 151,453,221
Stop Loss/Stop Gain Adjustment	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Student Success and Completion Model	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 617,951,178	\$ -	\$ -	\$ 617,951,178
Non-SSCM PUSF												
University Shared Services Enterprise (USSE)	\$ 1,489,522	\$ 1,521,622	\$ -	\$ -	\$ -	\$ 1,681,992	\$ -	\$ 1,260,448	\$ 5,953,584	\$ -	\$ -	\$ 5,953,584
Tuition Buy Down (HB 5101 continuation)	\$ 1,403,104	\$ 2,385,312	\$ 13,343,348	\$ 419,848	\$ 9,546,188	\$ 2,996,406	\$ 8,762,386	\$ 2,238,646	\$ 41,095,238	\$ -	\$ -	\$ 41,095,238
Total Non-SSCM PUSF	\$ 2,892,626	\$ 3,906,934	\$ 13,343,348	\$ 419,848	\$ 9,546,188	\$ 4,678,398	\$ 8,762,386	\$ 3,499,094	\$ 47,048,822	\$ -	\$ -	\$ 47,048,822
<i>Total Public University Support Fund</i>	\$ 2,892,626	\$ 3,906,934	\$ 13,343,348	\$ 419,848	\$ 9,546,188	\$ 4,678,398	\$ 8,762,386	\$ 3,499,094	\$ 665,000,000	\$ -	\$ -	\$ 665,000,000

Shaded cells are projections.

2015-17 Detail Allocation Table (Projected) - Page 2 of 2

	EOU	OIT	OSU	OSU-Cascades	PSU	SOU	UO	WOU	Total: Institutions	Other	Statewide Public Services	Total
<i>Non-PUSF General Fund Support</i>												
State Programs												
Engineering Technology Sustaining Funds	\$ 310,830	\$ 2,203,444	\$ 14,082,789	\$ -	\$ 6,469,800	\$ 489,588	\$ 293,691	\$ 601,132	\$ 24,451,274	\$ -	\$ -	\$ 24,451,274
Dispute Resolution	\$ -	\$ -	\$ -	\$ -	\$ 880,652	\$ -	\$ 1,635,497	\$ -	\$ 2,516,149	\$ -	\$ -	\$ 2,516,149
Oregon Solutions	\$ -	\$ -	\$ -	\$ -	\$ 2,257,451	\$ -	\$ -	\$ -	\$ 2,257,451	\$ -	\$ -	\$ 2,257,451
OSU Fermentation Science	\$ -	\$ -	\$ 1,239,600	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,239,600	\$ -	\$ -	\$ 1,239,600
Signature Research	\$ -	\$ -	\$ 494,274	\$ -	\$ 52,029	\$ -	\$ 494,274	\$ -	\$ 1,040,577	\$ -	\$ -	\$ 1,040,577
Labor Education Research Center	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 678,544	\$ -	\$ 678,544	\$ -	\$ -	\$ 678,544
OSU Ocean Vessels Research	\$ -	\$ -	\$ 619,800	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 619,800	\$ -	\$ -	\$ 619,800
Population Research Center	\$ -	\$ -	\$ -	\$ -	\$ 435,313	\$ -	\$ -	\$ -	\$ 435,313	\$ -	\$ -	\$ 435,313
Institute for Natural Resources	\$ -	\$ -	\$ 399,103	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 399,103	\$ -	\$ -	\$ 399,103
Clinical Legal Education	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 348,077	\$ -	\$ 348,077	\$ -	\$ -	\$ 348,077
Oregon Climate Change Research Institute	\$ -	\$ -	\$ 312,837	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 312,837	\$ -	\$ -	\$ 312,837
OSU Advanced Wood Products (w/UO)	\$ -	\$ -	\$ 2,500,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,500,000	\$ -	\$ -	\$ 2,500,000
Total State Programs	\$ 310,830	\$ 2,203,444	\$ 19,648,403	\$ -	\$ 10,095,245	\$ 489,588	\$ 3,450,083	\$ 601,132	\$ 36,798,725	\$ -	\$ -	\$ 36,798,725
Statewide Public Services												
Ag. Experiment Station	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 63,121,066	\$ 63,121,066
OSU Extension Service	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 45,601,540	\$ 45,601,540
OSU Forest Research	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 9,771,107	\$ 9,771,107
Total Statewide Public Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 118,493,713	\$ 118,493,713
One-time												
HB 2209 OSU Ocean acidification/Shellfish	\$ -	\$ -	\$ 500,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 500,000	\$ -	\$ -	\$ 500,000
SB 202 OSU INR Task Force Support	\$ -	\$ -	\$ 108,907	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 108,907	\$ -	\$ -	\$ 108,907
SB 5507 EOU Wrestling Program	\$ 300,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 300,000	\$ -	\$ -	\$ 300,000
SB 5507 PSU Oregon Solutions Task Force	\$ -	\$ -	\$ -	\$ -	\$ 62,300	\$ -	\$ -	\$ -	\$ 62,300	\$ -	\$ -	\$ 62,300
HB 2998 PSU Western Juniper	\$ -	\$ -	\$ -	\$ -	\$ 100,000	\$ -	\$ -	\$ -	\$ 100,000	\$ -	\$ -	\$ 100,000
HB 2002 PSU Profiling Study	\$ -	\$ -	\$ -	\$ -	\$ 250,431	\$ -	\$ -	\$ -	\$ 250,431	\$ -	\$ -	\$ 250,431
Total One-time	\$ 300,000	\$ -	\$ 608,907	\$ -	\$ 412,731	\$ -	\$ -	\$ -	\$ 1,321,638	\$ -	\$ -	\$ 1,321,638
Debt Service	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 119,704,939	\$ -	\$ 119,704,939
<i>Total Non-PUSF General Fund Support</i>	<i>\$ 610,830</i>	<i>\$ 2,203,444</i>	<i>\$ 20,257,310</i>	<i>\$ -</i>	<i>\$ 10,507,976</i>	<i>\$ 489,588</i>	<i>\$ 3,450,083</i>	<i>\$ 601,132</i>	<i>\$ 38,120,363</i>	<i>\$ 119,704,939</i>	<i>\$ 118,493,713</i>	<i>\$ 276,319,015</i>
Total State General Fund Allocation	\$ 3,503,456	\$ 6,110,378	\$ 152,094,371	\$ 419,848	\$ 20,054,164	\$ 5,167,986	\$ 12,212,469	\$ 4,100,226	\$ 703,120,363	\$ 119,704,939	\$ 118,493,713	\$ 941,319,015

EDUCATION AND GENERAL OTHER FUNDS REVENUE

The Education and General Other Funds revenue category of the operating budget is comprised principally of estimated campus tuition and fees (calculated on enrollment projections and tuition rates), indirect cost recovery on sponsored research, as well as lesser amounts of other income.

Under ORS 352.107 (1i), universities are no longer subject to expenditure limitations on any such revenues they directly collect, including tuition and fees. There are no legislative restrictions on increases in graduate tuition rates or nonresident undergraduates, though these rates are subject to approval by an institution's governing board. However, the HECC is tasked by ORS 350.075(3) (h) (B) with the following duties regarding undergraduate resident enrollment fees increases of more than 5% annually at public universities:

(3) The Higher Education Coordinating Commission shall:

(b) For public universities listed in ORS 352.002:

(B) Review and determine whether a proposed annual increase of resident undergraduate enrollment fees, as described in ORS 351.063, of greater than five percent is appropriate.

All universities have approved their tuition and fees for the 2015-16 academic year. With the exception of increases greater than 5% annually in resident undergraduate tuition, tuition rate approval is the domain of an individual institution and its governing board. For the 2015-16 academic year, only one institution (OSU) required such HECC approval, caused by a structure change in how students are charged tuition. The OSU tuition structure change resulted in potential increases over 5% to some students, triggering the HECC review requirement.

However, for the 2016-17 academic year, section 30 of 2015's SB 501³⁵, signed by the governor on August 13, 2015, states as follows:

(1) Notwithstanding any law limiting tuition and mandatory enrollment fee increases at public universities listed in ORS 352.002, if a public university listed in ORS 352.002 increases either resident undergraduate tuition or mandatory enrollment fees by more than three percent for the 2016-2017 academic year, the public university must report the justification for the increase to the Higher Education Coordinating Commission and the Joint Committee on Ways and Means, or the Joint Interim Committee on Ways and Means.

(2) Subsection (1) of this section does not apply to public universities currently subject to existing financial agreements or plans with the Higher Education Coordinating Commission, or to four-year tuition guarantees or high cost, high demand degree programs that currently charge differential tuition.

This legislative language does not require approval of these fee increases by the HECC or any other body other than an institution's governing board (provided that they are less than 5%) and does not require notification in the situations exempted in part (2) above. At this time there are no further restrictions on tuition and fee increases for the upcoming biennium.

There is, however, a budget note regarding \$30 million in PUSF funding that requires institutions to spend the funds on, among other things, "targeted tuition remissions for undergraduate Oregonians," so this should be taken into account by institutions when making tuition rate setting decisions.

Below is a summary of each institution's operating budgets that includes state-provided resources and tuition/fee revenues:

³⁵<<https://olis.leg.state.or.us/liz/2015R1/Downloads/MeasureDocument/SB501/enrolled>>

2015-16 INSTITUTION OPERATING BUDGETS

ALL SOURCES

	Allocation of State Funding				Estimated Campus Revenues		Total All Funds
	General Fund			Lottery Funds	E&G Other Funds ¹	Other Funds ²	
	Public University Support Fund	State Programs	Total GF				
Education and General Program							
EOU	\$ 19,096,072	\$ 155,415	\$ 19,251,487	\$ 456,619	\$ 19,076,513	\$ 19,115,000	\$ 57,899,619
OIT	\$ 23,682,597	\$ 958,007	\$ 24,640,604	\$ 456,619	\$ 28,517,350	\$ 22,721,457	\$ 76,336,030
OSU - Corvallis	\$ 96,301,866	\$ 10,100,669	\$ 106,402,535	\$ 515,000	\$ 388,277,576	\$ 541,574,271	\$ 1,036,769,382
OSU - Cascades	\$ 5,203,537	\$ -	\$ 5,203,537	\$ -	\$ 6,834,409	\$ 1,637,825	\$ 13,675,771
PSU	\$ 76,357,519	\$ 4,958,474	\$ 81,315,993	\$ 1,138,783	\$ 233,708,087	\$ 234,160,773	\$ 550,323,636
SOU	\$ 20,263,320	\$ 236,135	\$ 20,499,455	\$ 456,619	\$ 35,729,637	\$ 22,708,000	\$ 79,393,711
UO	\$ 62,658,731	\$ 1,654,525	\$ 64,313,256	\$ 515,000	\$ 417,981,000	\$ 467,000,865	\$ 949,810,121
WOU	\$ 22,286,359	\$ 300,273	\$ 22,586,632	\$ 581,358	\$ 43,123,494	\$ 25,801,200	\$ 92,092,684
Subtotal Education and General Program	\$ 325,850,001	\$ 18,363,498	\$ 344,213,499	\$ 4,119,998	\$ 1,173,248,066	\$ 1,334,719,391	\$ 2,856,300,954
Statewide Public Services:							
Agricultural Experiment Station	-	-	30,929,322	-	6,730,865	-	37,660,187
Extension Service	-	-	22,344,755	-	16,330,987	-	38,675,742
Forest Research Laboratory	-	-	4,787,842	-	4,563,371	-	9,351,213
Subtotal Statewide Public Services	-	-	58,061,919	-	27,625,223	-	85,687,142
2015-16 Total Operating Budget	325,850,001	18,363,498	402,275,418	4,119,998	1,200,873,289	1,334,719,391	2,941,988,096

1) Education & General Other Funds include tuition and fees, indirect cost recovery on sponsored projects and lesser amounts of other income. Prior to the passage of SB 242, this category was known as Other Funds Limited (OFL) and subject to legislatively established expenditure limitation.

2) Estimates of Other Funds include designated operations, service departments, auxiliary enterprises, restricted funds (gifts, grants, contracts) and student loan funds. Prior to the passage of SB 242, this category was known as "Other Funds Non-Limited" to distinguish this source from Other Funds "Limited" which were subject to legislative expenditure limitation.

3) Capital/legislative bonding authority has historically been reflected in the first year of the biennium.

DEBT SERVICE AND CAPITAL CONSTRUCTION

Public universities utilize the following types of debt:

- **General obligation bonded debt** (e.g. XI-G, XI-F, XI-Q, *Alternate Energy Bonds, Pension Obligation Bonds*) – General Obligation (GO) bond debt is secured by the full faith and credit of the State of Oregon. In the State’s case, each GO bond program was created by a constitutional amendment passed by state voters. Therefore, the People of the State have unconditionally pledged to pay debt service (i.e. principal and interest) payments, over the life of each GO issue. This means that, barring the existence of other adequate repayment sources, all unrestricted public revenues must be used as needed to support debt service payments. This may include the levy of a statewide property tax if necessary and allowed by law.
- **Direct revenue bonded debt** (e.g. *Lottery Bonds, Revenue Bonds*) - Unlike GO bonds, direct revenue program debt is not secured by the State’s unlimited pledge to fund debt service with unrestricted public revenues or, where permitted, a statewide ad valorem property tax. Rather, funds to pay debt service are provided by a specific and dedicated revenue stream. Further, revenue programs typically do not require a vote of the People, but must be authorized by the Legislative Assembly. The State Legislature at all times holds the right to refer program approval to Oregon voters. Direct revenue bond programs are each considered fully self-supporting, and have no general obligation backing from the State. However, if program revenues were to become insufficient to support debt service payments, this does not preclude the State from providing a funding stream.
- **Appropriation credits** (e.g. *COPs*) - These credits are special limited obligations of the State payable solely from funds appropriated or otherwise made available by the State Legislative Assembly. The obligation of the State to provide appropriated moneys and to pay the bonds is subject to future appropriation by the Legislature for the fiscal period in which payments are due. As with State direct revenue bond programs, appropriation credits do not require a vote of the People, but must be authorized by the Legislative Assembly. Similar to revenue program debt, appropriation credits are not secured by the State’s unlimited pledge to fund debt service with unrestricted public revenues or, where permitted, a statewide ad valorem property tax. The State currently uses two types of appropriation credits: Appropriation Bonds and Certificates of Participation.

The legislature has been granted the authority by the Oregon Constitution to authorize, on behalf of the HECC and public universities, the issuance of bonds for construction, equipping, rehabilitation, remodeling, and repair of facilities. The Legislature has authorized the following types of debt for public universities: Under the terms of HB 3199³⁶, the HECC is responsible for managing these debt types for public universities in concert with the Department of Administrative Services and the Oregon State Treasurer’s Office.

1) Article XI-G Bonds

These bonds are general obligation bonds issued for facilities that are of a general classroom and/or laboratory nature including Education & General type buildings (which could include administration buildings such as Kerr or Oregon Hall). Dedicated State General Funds are appropriated each biennium for debt service payments on Article XI-G Bonds for capital construction. Due to the likelihood for a late biennium bond sale, the state does not budget debt service in the biennium an XI-G funded capital project is approved for higher education. The debt service costs are rolled up in the next biennium’s budget. In the biennium for which the bond issuance is approved, the institution for which the bond is issued must fund any debt payment due. XI-G bonds may be structured or timed so that no debt service is due until the following biennium. Alternatively, interest earnings on unspent bond proceeds may be used to pay any interest expense due.

Article XI-G Bond History:

In November 1960, Oregon voters approved a legislatively referred constitutional amendment that authorized the State of Oregon to issue XI-G bonds in order to finance the construction of buildings on Oregon public university and community college campuses. Originally under Article XI-G, the state legislature was required to “match” dollar for dollar the amount of XI-G bonds with upfront general fund appropriations before the state could undertake debt through the sale of bonds. This meant Oregon taxpayers would pay the entire bill, half of which was paid up front with general fund appropriation, and half financed over time. The legislature retires the bonds through general fund appropriations over the 20-30-year lifespan of the bonds. Funding can be used for both new buildings and to maintain or restore existing buildings. Beginning in the late 1980s and following the passage of Ballot Measure 5 in 1990, the legislature essentially eliminated the use of direct appropriations of general funds to be used as the only match for the construction of new buildings financed under Article XI-G. However, after the inception of the state lottery in 1985,

³⁶<<https://olis.leg.state.or.us/liz/2015R1/Downloads/MeasureDocument/HB3199/Enrolled>>

the legislature began to use lottery bonds, both as a match for Article XI-G bonds and as an alternative form of financing. In the 1993 session, the legislature also began to use privately raised funds as the match for Article XI-G financing. This approach enabled individual universities to raise the necessary match through philanthropic contributions. Once a project was approved by the legislature, foundations would deposit funds with the State Treasury so that they could be considered as the general fund match for the bonds. In the 2000s the legislature approved XI-G projects matched with proceeds from the sale of COPs and SELP alternative energy bonds.

Historically the legislature has not approved Article XI-G financing for a building until the university demonstrated that it had the money in hand, or would be able to deposit the entire amount in the Treasury at some point during the biennium. The HECC is now responsible for such determinations under HB 3199.

2) Article XI-F (1) Bonds

Article XI-F (1) bonds are general obligation bonds used to finance capital projects on facilities where an individual university has “sufficient revenues to pay the indebtedness and operate the projects financed with the proceeds of the indebtedness” (revenues includes all funds available to the constructing authority except amounts appropriated by the legislative assembly from the General Fund).

Revenues from auxiliaries, gifts, grants, investment earnings and building fees are used for debt service payments. Under HB 3199, the HECC is responsible for conducting revenue sufficiency tests required to issue XI-F (1) bonds.

3) Article XI-Q Bonds

These bonds are general obligation bonds to finance the costs of acquiring, constructing, remodeling, repairing, equipping or furnishing real or personal property that is or will be owned or operated by the State of Oregon. Oregon voters approved a constitutional amendment in November 2010 authorizing the use of general obligation bonds (including XI-Q bonds) to finance or refinance the costs of acquiring, constructing, and equipping real or personal property. Statutory authority to issue XI-Q bonds is provided in ORS 286A.816-826. Article XI-Q bonds are expected to replace certificate of participation debt issuances in the future, resulting in significant savings in borrowing costs. Under HB 3199, the HECC will serve as the “project agency” for XI-Q bonds involving public universities.

4) Lottery bonds

Lottery bonds are direct revenue bonds. Unlike general obligation bonds, revenue bonds are not secured by the state’s unrestricted public revenues (ORS 286A.560 to 286A.585). Lottery bonds have been used to fund a variety of Education & General related deferred maintenance and other projects. Dedicated lottery revenues pay the debt service on these bonds.

Lottery Bond History:

Reliance upon foundations for matching Article XI-G bonds has created disparities in access to capital across public university campuses. Those campuses with larger foundations have been better able to fill the gap created by the elimination of general funds for new capital projects. The legislature responded by using lottery bonds at the regional campuses to fill in some of the gaps. In some instances, lottery bonds have also been used by the state to fund non-deferred maintenance capital projects when there has been a shortage in General Obligation bond debt capacity from other financing instruments.

5) Small Scale Energy Loan Program (SELP) loans

Alternate Energy, or XI-J, bonds are general obligation bonds sold to provide loan funds for energy projects that promote energy conservation and renewable energy resource development. Eligible projects include those involving energy conservation, producing energy from renewable resources, using recycled materials to create new products, or producing or using alternative fuels. Universities have used SELP loans for a variety of deferred maintenance and other energy conservation capital projects in the last decade.

State Energy Loan Program History:

In 1979, the legislature created the Small Scale Energy Loan Program (SELP). In 1980, voters approved an amendment to the Oregon Constitution (Article XI-J) authorizing the sale of general obligation bonds to finance small scale, local energy projects. The self-supporting program often makes loans that conventional lenders will not make. In other cases, SELP’s tax-exempt rates or long-term, fixed-rate loans make a project economically viable.

Campuses request energy loans directly from the Department of Energy for various non-deferred maintenance related SELP projects. Beginning in the 2005 legislative session the OUS began requesting approval through the legislative capital budget process for SELP loans for E&G related deferred maintenance projects. As a result, OUS began receiving General Fund Appropriation for debt service on those deferred maintenance projects whose energy savings were not enough to cover the full debt service payment.

6) Certificates of Participation (COPS) ORS 283.085 to 283.092

COPs are appropriation credits (tax exempt) and are not secured by the State’s unlimited pledge to fund debt service with unrestricted public revenues. These credits are special limited obligations of the State payable solely from funds appropriated or otherwise made available by the State Legislative Assembly. The obligation of the State to provide appropriated moneys and to pay the debt service of the bonds is subject to future appropriation by the Legislature for the fiscal period in which payments are due. Because COPs are not secured by the full faith and credit of the issuer, the Legislature must approve the COP repayment amounts prior to each biennium for which payments are scheduled. In other words, the Legislature could deny a budget request for COP debt service. Should the State fail to make scheduled COP payments, the state may be denied use of the financed building(s) and equipment. Furthermore, the ability of the State to obtain financing for future needs would be lost. COPs were used to finance capital costs related to construction or acquisition and could not be used to finance ongoing operating costs. Universities have used COPs to finance certain equipment, computer software purchases as well as various construction projects. COPs were an attractive debt instrument for financing deferred maintenance projects since there is no requirement for matching funds. While debt service related to technology projects has historically been funded by operating revenues from the campuses (primarily tuition), construction related debt financed with COPs have been primarily funded by state appropriation.

As a result of the 2010 constitutional amendment allowing the use of XI-Q bonds to finance the costs of acquiring, constructing, and equipping real or personal property, XI-Q bonds are expected to replace the Certificate of Participation program and result in significant savings in borrowing costs due in part to a more favorable credit rating of general obligation bonds.

2015-17 Legislatively Adopted Debt Service Budget³⁷

The Oregon Legislature approved a total debt service budget of \$376,177,865 total funds for the upcoming biennium. Of that, \$119,704,939 general fund was appropriated to pay debt service on Article XI-G bonds, XI-Q bonds, Certificates of Participation (COPs), Small-Scale Energy Loan Program (SELP) loans, and debt-related costs. \$31,887,710 in lottery funds were appropriated for the repayment of lottery bonds. The remaining \$224,585,216 in other funds reflects debt service payments to be made by institutions, which will route debt service payments for such self-supported projects through the HECC.

The following chart shows the debt service budget for the upcoming biennia as outlined in HB5024.

Debt Service Type	General Fund (State-Paid)	Lottery Fund	Other Funds (Debt Service Payments by Institutions)	Total Debt Service
Amount of debt service	\$119,704,939	\$31,887,710	\$224,585,216	\$376,177,865

University Capital Construction Budget for 2015-17:

The Oregon Legislature approved the 2015-17 capital construction budget in HB 5005. The Legislature approved 12 new bonded projects that total \$244,760,000 in state-paid bonds and \$53,680,000 in institution-paid bonds, and reauthorized two projects from the 13-15 biennium totaling \$17,305,000 in institution-paid bonds. A full list of the state bonding for these projects is provided below. The legislature inserted the following budget note concerning capital improvement and renewal into the HB 5005 budget report:

³⁷ Pages 15-16 < <https://olis.leg.state.or.us/liz/2015R1/Downloads/MeasureAnalysisDocument/32142>>

The Higher Education Coordinating Commission, in collaboration with the seven public universities and the Department of Administrative Services, shall submit a report by December 31, 2015 to the Legislative Fiscal Office that identifies whether and how revisions in statute and/or administrative rules are needed to better enable universities to use capital improvement and renewal funds to implement disability access improvements.

Below is a summary of capital projects approved in the 2015 legislative session:

2015-17 New Capital Project Bonding (in millions) - Includes Issuance Costs						
Institution	Project Name	XI-F Funding	XI-G Funding	XI-Q Funding	Other Institutional Funding (XI-G Match)	Total
All	Capital Improvement, Renewal and Accessibility	\$ -	\$ -	\$ 65,770,000	\$ -	\$65,770,000
EOU	Hunt Hall Demolition and Site Restoration	\$ -	\$ -	\$ 3,040,000	\$ -	\$3,040,000
OIT	Center for Excellence in Engineering Technology and Bolvin Hall Renovation	\$ -	\$ 785,000	\$ 10,395,000	\$ 785,000	\$11,965,000
OSU	Forest Science Complex	\$ -	\$30,140,000	\$ -	\$ 29,702,970	\$59,842,970
	Marine Studies Campus, Phase I	\$ -	\$25,155,000	\$ -	\$ 24,752,475	\$49,907,475
PSU	Neuberger Hall Deferred Maintenance and Renovation	\$ -	\$10,220,000	\$ 50,660,000	\$ 10,000,000	\$70,880,000
	Broadway Housing Purchase	\$53,680,000	\$ -	\$ -	\$ -	\$53,680,000
SOU	Britt Hall Renovation	\$ -	\$ -	\$ 4,785,000	\$ -	\$4,785,000
UO	Klamath Hall Renovation	\$ -	\$ 6,325,000	\$ 6,075,000	\$ 6,250,000	\$18,650,000
	College and Careers Building	\$ -	\$17,275,000	\$ -	\$ 17,000,000	\$34,275,000
	Chapman Hall Renovation	\$ -	\$ 2,550,000	\$ 5,570,000	\$ 2,500,000	\$10,620,000
WOU	Natural Sciences Building Renovation	\$ -	\$ -	\$ 6,015,000	\$ -	\$6,015,000
All Universities (Total):		\$53,680,000	\$92,450,000	\$152,310,000	\$90,990,445	\$389,430,445

Capital Improvement/Renewal/Accessibility:

- This provides for an omnibus capital funding category to address current capital improvements, code compliance, ADA and safety related projects. Funding will be allocated to each institution on a request basis and proportionate to their total education and general (E&G) square footage.

EOU:

- **Hunt Hall Demolition/Site Restoration:** The project will remove a 72,300 sf facility that is deteriorating, undesirable and has the highest cost/sf ratios on the campus for utilities, repair and maintenance. That building will be replaced with a 36,700 sf energy efficient facility that will fulfill needs critical to EOU's mission.

OIT:

- **Center for Excellence in Engineering and Technology Phase I:** Phase one will provide additional needed expansion for the College of Engineering, Technology & Management (ETM) and is critical in order to provide space needed for the phase two and three renovation and modernization of the 120,000 gross square foot two-story

classroom and lab building (currently known as Cornett Hall). Phase I construction will include special purpose engineering spaces unique to OIT’s program mix. These include a wind tunnel, tensile strength testing machine and welding labs.

OSU:

- **Forest Science Complex:** The project will establish an applied research center in partnership with private sector manufacturers to drive the innovation, testing and educational programs necessary for private investment in advanced wood products manufacturing capacity in Oregon’s rural communities.
- **Marine Science Complex Phase I:** The Marine Studies Campus represents OSU’s strategic effort to achieve OSU’s full potential as a leader in marine studies by bringing together key resources for research, education, and engagement.

PSU:

- **Broadway Housing Purchase:** The purchase of the building by PSU will allow the University to reduce the overall operating cost of the building by eliminating the lease payments and by providing a lower interest debt payment.
- **Neuberger Hall-Demolition and Renovation:** Neuberger Hall is in very poor condition. The building is in urgent need of significant upgrade or replacement of its major systems to remain operational and address safety issues. Operating costs of the building have skyrocketed as the university has fought to keep this critical building open for students. There is a growing concern of a catastrophic failure that would force a closure of the building and cause a major disruption for students.

SOU:

- **Britt Hall Renovation:** This project will “stiffen” the building to meet current seismic standards and modify the existing HVAC system to meet current loads.

U of O:

- **Chapman Hall Renovations - Seismic Upgrade and Deferred Maintenance:** The University has an extremely urgent need to address critical deferred maintenance and seismic upgrade needs in Chapman Hall, the home of the Clark Honors College and one of the campus’s highest ranking historic buildings. This project will strengthen the Honors College’s identity and will consolidate College functions to one location.
- **College and Careers Building:** The College and Careers Building project will enhance student recruitment, retention, graduation, and future success by merging core academic activities with advising on career opportunities.
- **Klamath Hall for 21st Century Chemistry:** This project converts all of the lab space on the 3rd floor of Klamath Hall into state-of-the-art, synthetically-oriented, high-density hooded laboratories and concurrently builds/outfits a new 4th floor of Klamath Hall for faculty and student offices.

WOU:

- **Natural Science Building Renovation:** This project will make it possible to reorganize and expand Western’s science program to accommodate new and relevant trends in science, and the anticipated increase in student enrollment.

2015-17 Reauthorized Capital Projects (in millions) - Includes Issuance Costs						
Institution	Project Name	XI-F(1) Funding	XI-G Funding	XI-Q Funding	Other Institutional Funding	Total Cost
OSU	Modular Data Center	\$7,085,000	\$ -	\$ -	\$ -	\$7,085,000
PSU	University Center Land Purchase	\$10,220,000	\$ -	\$ -	\$ -	\$10,220,000
All Universities (Total):		\$17,305,000	\$ -	\$ -	\$ -	\$17,305,000

OSU:

- **Modular Data Center:** The reauthorization is critical to support increased operational efficiencies and capacity for OSU’s Information Technology infrastructure. The project’s modular approach allows OSU to disperse data centers throughout the OSU Corvallis campus to provide additional capacity, flexibility, and enhanced resilience for university instructional, research, and administrative activities.

PSU:

- **University Center Land Purchase:** PSU currently owns the University Center Building (UCB) but not the underlying land. PSU has a long-term land lease that expires in 2023 at which time the improvements revert back to the landlord. Debt service on the land, if owned by PSU, is anticipated to be less than the current lease rate until 2018 and significantly less beginning in 2018. This reauthorization will therefore result in a net savings to PSU.

APPENDIX A: GLOSSARY AND COMMON ABBREVIATIONS

Glossary:

Agency Requested Budget (ARB)-An agency's requested biennial budget submitted to the Governor by August 30 of every even numbered year.

Biennium- A two-year fiscal period. Oregon approves a "biennial budget" every two years. It consists of two annual budgets, one for each fiscal year. The biennium runs from July 1 of an odd-numbered year to June 30 of the next odd-numbered year.

Budget Note-A legislatively expressed direction to a state agency or other part of state or local government to undertake certain activities, included in the budget report for a budget bill.

Budget Report-The document, prepared by the staff of the Joint Committee of Ways and Means, providing further details on how funds appropriated through a budget bill are to be spent.

Current Service Level (CSL)-A budgetary term that refers to any budget proposal which requests future funding for service provision "at the current level." The current service level will reflect changes due to inflation, labor contract changes, caseload changes, and any other changes required to continue to provide the same level of service.

Debt Service-Cash that is required for a particular time period to cover the repayment of interest and principal on a debt incurred by an institution. Debt service can be incurred and paid by via institutions, general fund or lottery funds.

Distribution-A quarterly disbursement of funds to institutions in concert with the rules set out via the SSCM and other specific legislative direction, operated in concert with OAR 715-013-0005.

Fiscal Year (FY)-The 12-month period beginning July 1 and ending June 30, used by the state government for accounting purposes. Fiscal year designation is based on the year in which it ends [e.g., fiscal year 2016 (FY 2016) runs from July 1, 2015 - June 30, 2016].

General Fund- Fund used to account for all assets and liabilities of the state of Oregon except those particularly assigned for other purposes in another more specialized fund. It is the primary funding vehicle for public universities.

Governor's Recommended Budget (GRB)-The recommended biennial budget of the Governor, released in December of every even numbered year.

Higher Education Coordinating Commission (HECC)- The body established by ORS 350.050 and appointed by the Governor for the purposes of coordinating and promoting higher education, workforce development and other related initiatives.

Inflation-Defined as the annual change in the Consumer Price Level (CPI) in the Portland, OR metro region as determined by the Bureau of Labor Statistics.

Joint Committee on Ways and Means-The primary budget writing committee of the Oregon legislature, responsible for passing all budgets and jointly chaired by one member each from the majority party from the Oregon House and the Oregon Senate.

Legislatively Approved Budget (LAB)-The budget approved by the Oregon legislature, largely on a biennial basis.

Lottery Funds-Funds generated from proceeds from the Oregon State Lottery and designated for specific purposes as outlined by Article XV, Section 4 of the Oregon Constitution.

Oregon Health Sciences University (OHSU)-An independent corporation and institution of higher learning as established by ORS 353.020.

Oregon University System (OUS)-The former governing body for Oregon's universities, abolished effective July 1, 2015 and primarily replaced by the HECC and the public universities.

Public University-Any institution of higher learning as defined in ORS 352.002, including; the University of Oregon (UO), Oregon State University (OSU), which includes Oregon State University's Cascades Campus (OSU-CC), Portland State University (PSU), Oregon Institute of Technology (OIT), Western Oregon University (WOU), Southern Oregon University (SOU), and Eastern Oregon University (EOU).

Public University State Programs-Separately funded programs conducted at public universities that further the public service and educational missions of the institution. Providing general fund support for certain institutes, centers, and programs operated by public universities that address economic development, natural resource and other issues. Many of these programs have an industry-specific focus, matching state support with funds from private sector and other sources. It also includes any funding for programs designated as "one-time (only intended to be funded for one biennium)."

Public University Support Fund (PUSF)-The primary state funding vehicle for Oregon's public universities. The PUSF represents the state's General Fund contribution to the operation of education, student support, research, and public service programs.

Statewide Public Service Programs (SWPS)-Oregon State University's three Statewide Public Service Programs (Extension Service, Agricultural Experiment Station and Forest Research Laboratory) improve the lives of Oregonians through discovery, outreach, and learning focused on critical issues of importance to communities throughout the state and the world.

Student Success and Completion Model (SSCM)-The primary vehicle for determining funding allocations to universities, split into three parts. First, Mission Differentiation (MD) Funding supports the unique regional, research and public service missions and activities of each university, as "line item" funding for services, programs or general operations. Second, Activity-Based Funding distributes resources based on student credit hour (SCH) completions of Oregon resident students at undergraduate and graduate levels. Third, Completion Funding rewards degree and certificate completions by Oregon resident students. Completions by underrepresented students (underrepresented minority, low-income, rural and veteran status) and those in academic disciplines in high-demand and high-reward fields (STEM, Health, Bilingual Education) are provided additional weighting in the allocation formula.

Technical and Regional University (TRUs)-The four technical and regional universities (EOU, OIT, SOU and WOU), as well as OSU-Cascades for some purposes, each of which offer a full slate of undergraduate and some graduate programs but few doctoral programs, and which primarily serve a specific regional area of technical focus of the state of Oregon.

Common Abbreviations:

ARB-Agency Requested Budget.
BRS-Budget Report Summary
CIP-Classification of Instructional Programs Codes
CSL-Current Service Level
DS-Debt Service
E&G-Education and General
EOU-Eastern Oregon University
FF-Federal Funds
FTE-Full-Time Equivalent Student
FY-Fiscal Year
GF-General Fund
GRB-Governor's Recommended Budget
HECC-Higher Education Coordinating Commission
LF-Lottery Fund
LAB-Legislatively Adopted Budget
NCES-National Center for Education Statistics
OF-Other Funds
OIT-Oregon Institute of Technology
OSU-Oregon State University
OSU CC-Oregon State University-Cascades
OUS-Oregon University System
OHSU-Oregon Health and Science University
PSU-Portland State University
PUSF-Public University Support Fund
RAM-Resource Allocation Model
SELP-State Energy Loan Program
SHEEO-State Higher Education Executive Officers Association
SOU-Southern Oregon University
SSCM-Student Success and Completion Model
SWPS-Statewide Public Service Programs
TRU-Technical and Regional University
UO-University of Oregon
WICHE-Western Interstate Commission for Higher Education
WOU-Western Oregon University

APPENDIX B: LEGISLATIVE BUDGET NOTES

HB 5024³⁸ (2015)-HECC Budget Bill

1. The additional \$30.0 million post-revenue forecast allocation for the biennium is to be used to fund campus investments in targeted tuition remissions for undergraduate Oregonians, and programs to improve student graduation. These would be programs detailed previously by the universities to the HECC for how they would use additional investments addressing access, affordability, and student success. The seven universities will commit to continuing these investments in both years of the biennium. The universities will report to HECC, and legislative committees, how they have invested the funds. All additional funds will flow through the Student Success and Completion Model (SSCM).
2. Oregon State University shall provide a report to the Legislative Assembly for consideration during the 2016 legislative session regarding the implementation of programs and activities enabled by the \$14.0 million funding increase for the Statewide Public Service Programs – the Agricultural Experiment Station, the Extension Service, and the Forest Research Laboratory. This report should identify the progress made in hiring additional staff and researchers, and the various activities undertaken and planned for the remainder of the 2015-17 biennium and into the future.

HB 5005³⁹ (2015)-Capital Bonding Bill

The Higher Education Coordinating Commission, in collaboration with the seven public universities and the Department of Administrative Services, shall submit a report by December 31, 2015 to the Legislative Fiscal Office that identifies whether and how revisions in statute and/or administrative rules are needed to better enable universities to use capital improvement and renewal funds to implement disability access improvements.

SB 5507⁴⁰ (2015)-Omnibus Budget Bill

The Oregon Health Authority, in collaboration with the Department of Consumer and Business Services, shall work with the University of Oregon on the vaccination program for meningitis. The Department of Consumer and Business Services shall ensure timely insurance coverage is covering appropriate costs for those with insurance. The Oregon Health Authority shall, within existing emergency preparedness funds, work with the University of Oregon on funding appropriate costs. The Oregon Health Authority and the University of Oregon shall report to the appropriate legislative committee the final cost of the program including any additional funding needs by December 2015 and any recommendations to ensure effective and efficient response to any future events.

³⁸ <<https://olis.leg.state.or.us/liz/2015R1/Downloads/MeasureAnalysisDocument/32142>>

³⁹ <<https://olis.leg.state.or.us/liz/2015R1/Downloads/MeasureAnalysisDocument/32413>>

⁴⁰ <<https://olis.leg.state.or.us/liz/2015R1/Downloads/MeasureAnalysisDocument/32421>>

APPENDIX C: OTHER KEY EDUCATION BILLS FROM THE 2015 LEGISLATIVE SESSION

HB 2728⁴¹-Oregon Talent Council

Creates a new “Oregon Talent Council” to advise and act as a resource for state agencies and educational institutions on issues of talent development, in order to promote growth and competitiveness in Oregon’s traded sector and high growth industries. The new Oregon Talent Council will control the 20% of ETIC funds that had been its “renewable funds.” amounting to \$6,112,818 for the upcoming biennia and will be supported primarily by the Oregon Employment Department.

HB 2871⁴²-Open Educational Resources

Creates a new grant program to help produce and distribute open educational resources for at least 15 courses during the upcoming biennium. The HECC will coordinate and issue grants for this program.

HB 3335⁴³-University Associates Degrees

Requires Higher Education Coordinating Commission to work with public universities to award associates degrees to students who enroll at public university, complete two or more years of coursework and leave university without graduating or receiving official recognition.

SB 81⁴⁴-Oregon Promise Program

Requires Community Colleges to waive all but \$50 of tuition and fees for students meeting specified criteria. Establishes a cap of \$10 million for this program, which will begin in the 2016-17 academic year.

SB 473⁴⁵-Sexual Orientation and Preferred Name Inclusion

Requires public universities to collect information on sexual orientation on demographic forms and to permit students to use their preferred (instead of legal) first name wherever possible.

⁴¹ <<https://olis.leg.state.or.us/liz/2015R1/Downloads/MeasureDocument/HB2728/Enrolled>>

⁴² <<https://olis.leg.state.or.us/liz/2015R1/Downloads/MeasureDocument/HB2871/Enrolled>>

⁴³ <<https://olis.leg.state.or.us/liz/2015R1/Downloads/MeasureDocument/HB3335/Enrolled>>

⁴⁴ <<https://olis.leg.state.or.us/liz/2015R1/Downloads/MeasureDocument/sb81/Enrolled>>

⁴⁵ <<https://olis.leg.state.or.us/liz/2015R1/Downloads/MeasureDocument/sb473/Enrolled>>

APPENDIX D: RELEVANT OREGON ADMINISTRATIVE RULES

715-013-0005

Allotment Authority

- (1) Effective December 23, 2014, the Higher Education Coordinating Commission delegates to the Executive Director, or designee, authority in all areas of fiscal and administrative responsibility necessary for the execution of Commission policy relating to the allotment of funds to public universities and Oregon Health Sciences University.
- (2) The Executive Director, or designee, shall have the authority to distribute funds to public universities and to Oregon Health and Science University in the amounts appropriated to the HECC for public universities and Oregon Health and Science University by the Oregon Legislature.
 - a. Funds shall only be distributed to public universities and Oregon Health Sciences University for the specific purposes outlined in statute or by the Oregon Legislature.
 - b. This section shall be construed to apply to all distributions of funds by the HECC to public universities and Oregon Health Sciences University, including but not limited to:
 - i. Funds distributed through the Student Success and Completion Model as outlined in OAR 715-013-0025 and OAR 715-013-0040.
 - ii. Funds distributed to Oregon Health and Science University for support of its Schools of Medicine, Nursing and Dentistry as well as to provide funds to its education, public health and rural health programs.
 - iii. Funds distributed to state programs as authorized by law or legislative action.
 - iv. Statewide Public Service programs as authorized by law or legislative action.
 - v. Funds allocated to the Sports Lottery Account as authorized by ORS 461.543.
 - vi. Any other funds authorized by the Oregon Legislature to the HECC for distribution to Public Universities or OHSU.

Statutory Authority: ORS 350.075(6),
Statutes Implemented: ORS 350.075(3)(iii)(f)

Public University Support Fund Distribution

(1) Definitions:

- (a) “Baccalaureate Degree” or “Bachelor’s Degree” is a degree that generally represents four years of college study, or it’s equivalent in depth and quality of learning experience, or as promulgated by the Northwest Commission on Colleges and Universities.
- (b) “Classification of Instructional Programs” or “CIP” code is a numerical identifier assigned by the National Center for Education Statistics to an academic discipline to support tracking and reporting data at the field-of-study level.
- (c) “Cost Weighting” is a means by which the value of any Student Credit Hour or degree completion based allocation is adjusted to account for the relative cost to an institution of providing a degree or course. Cost weighting is the same at all institutions and is determined by CIP and by the type of course or degree taught or awarded.
- (d) “Current Service Level (CSL) Budget” is the calculated cost of continuing only current legislatively-approved programs into future biennia while subtracting one-time allocations as determined by the Department of Administrative Services.
- (e) “Doctoral Course” is a course completed by Ph.D. level students.
- (f) “Doctoral Degree” or “Ph.D.” is a degree that generally indicates the recipient has done, and is prepared to do, original research in a major discipline. Doctoral degrees usually require three years or more of graduate-level coursework and an original research thesis or project, or as promulgated by the Northwest Commission on Colleges and Universities.
- (g) “Dual Credit” course is that which awards secondary and postsecondary credit as determined by both the granting secondary institution and granting public university.
- (h) “Graduate Certificate” is an official recognition of less than one year of post-baccalaureate study, or it’s equivalent in depth and quality, or as promulgated by the Northwest Commission on Colleges and Universities.
- (i) “Higher Education Coordinating Commission,” “HECC” or “Commission” is the body established by ORS 351.715 and appointed by the Governor.
- (j) “Inflation” is defined as the previous full year CPI-U for the Portland, Oregon area as determined and defined by the US Bureau of Labor Statistics.
- (k) “Low Income Student” is defined as resident undergraduate students who have received the Pell Grant at any point during their time enrolled within a public university in Oregon
- (l) “Lower Division Undergraduate Course” is a course completed by freshman, sophomore, or nonadmitted undergraduate level students.
- (m) “Master’s Course” is a course completed by master’s degree, other graduate, or nonadmitted graduate level students.
- (n) “Master’s Degree” is a degree that generally represents a first graduate degree, including one year or more of post-baccalaureate study, or its equivalent in depth and quality. Professional masters degrees generally require up to two years or equivalent of coursework beyond the baccalaureate level, or as promulgated by the Northwest Commission on Colleges and Universities.

- (o) “Outcomes” is an indicator of student achievement or educational attainment for state funding purposes, as determined by the HECC.
- (p) “Professional course” is a course completed by first professional degree students.
- (q) “Professional degree” is a degree that emphasizes application of knowledge in the field, including three or more years of carefully prescribed graduate level coursework, or as promulgated by the Northwest Commission on Colleges and Universities.
- (r) “Public university” or “University” is any institution of higher learning as defined in ORS 352.002, including; the University of Oregon (UO), Oregon State University (OSU), which includes Oregon State University’s Cascades Campus (OSU-CC), Portland State University (PSU), Oregon Institute of Technology (OIT), Western Oregon University (WOU), Southern Oregon University (SOU), and Eastern Oregon University (EOU).
- (s) “Public University Support Fund” or “PUSF” is the general fund appropriation to the HECC intended for distribution by HECC to public universities as defined in ORS 352.002.
- (t) “Resident” student is a student classified as such by a public university’s Residency Classification Officer, reviewed by the Inter-Institutional Residency Committee, or students granted resident tuition under ORS 351.641 and all doctoral students.
- (u) “Rural Student” are first time-freshmen resident undergraduate students who are graduates of an Oregon high school classified by the National Education Statistics Locale Codes as follows: (31) Town Fringe, (32) Town Distant, (33) Town Remote, (41) Rural Distant, (42) Rural Fringe, and (43) Rural Remote.
- (v) “Settle-Up” is the process by which allocations determined and allotted using estimated completion data are reconciled with finalized allocations created using actual finalized end data.
- (w) “Stop Gain” is designed to prevent an institution from receiving an increase in allocation in excess of a pre-determined threshold percentage. If the Stop Gain is triggered, the excess allocation from the triggering institution is distributed proportionally to all non-triggering institutions. Only the amount necessary to bring all institutions within the Stop Gain threshold is re-distributed.
- (x) “Stop Loss” can be either a negative or positive percentage and is designed to prevent an institution from receiving a decrease in allocation beyond a pre-determined threshold. If Stop Loss is triggered, all institutions that receive an allocation that exceeds the Stop Loss threshold contribute a proportional amount of allocation to those institutions whose allocation fell below the Stop Loss threshold. Only the amount necessary to bring all institutions at or above the Stop Loss threshold is re-distributed.
- (y) “Student Credit Hour” or “SCH” is a unit of course completion as determined by a public university in accordance with standards promulgated by Northwest Commission on Colleges and Universities.
- (z) “Student Success and Completion Model” or “SSCM” is a calculation-driven mechanism for determining the proportion of PUSF allocated to each public university.
- (aa) “Targeted Student Populations” consist of undergraduate resident students which meet the criteria to be included in one or more of the following non-exclusive populations: (1) Underrepresented Minority students, (2) Low Income students, (3) Rural students and (4) Veteran students.
- (bb) “Transfer student” is defined by the SCARF data dictionary as a resident student who has an associate’s degree or as defined by a public university and accepted by HECC policy or Administrative Rule. Transfer students shall

also include any student admitted with college credits and completion of an accepted English as a foreign language test, where appropriate, as well as some special or probationary admissions. Transfer students do not include any student who graduated from high school less than 5 2/3 months before the start of the Fall Term in which they first enroll or less than three months before the start of the Winter, Spring or Summer Term in which they first enroll regardless of how many college credits they have earned.

- (cc) “Underrepresented Minority students” are those resident undergraduate students identified in as American Indian/Alaskan Native, Hispanic, Pacific Islander, Black, African American or two or more races if one of those two or more races is one of those established in this definition.
 - (dd) “Upper Division Undergraduate Course” is a course completed by junior, senior, or post baccalaureate undergraduate level students.
 - (ee) “Veteran students” are those resident undergraduate demarcated in the SCARF system as a veteran of the U.S. Armed Forces as determined by the University in accordance with HECC policy and administrative rules.
- (2) Effective beginning July 1, 2015, the Student Success and Completion Model (SSCM) shall be the method for determining a public university’s allocation of the PUSF.
 - (3) The SSCM will incorporate a public university’s degree and SCH completion information for the three most recently completed fiscal years, or projections thereof, in determining allocation amounts.
 - (4) Whenever possible, projections will be completed on or about the third quarter of the prior fiscal year for the subsequent fiscal year that begins July 1st of the same calendar year. Projections may be used for determining the first quarterly allotment of a fiscal year.
 - (5) When projections are used to determine a public university’s allocation, a Settle-Up procedure shall be used to prorate un-allotted payments to adjust for finalized data. The Settle-Up procedure may alter the funding allocation of a public university from that which was originally allocated by the HECC. A Settle-Up procedure, if used will be executed in the second quarter, or as soon as practicable in every fiscal year, and as approved by vote of the HECC. If necessary, a Settle-Up may take place in subsequent fiscal years but will, in general, be avoided.
 - (6) The Student Success and Completion Model consists of three components, Mission Differentiation Funding Allocation, Activity-Based Allocation and Outcomes-Based Allocation. The methods and amounts of funds to be allocated to these three categories are established in OAR 715013-0040 Section 2.
- (a) Mission Differentiation Funding is determined by the HECC. Mission Differentiation Funding supports a public university’s activities consistent with, but not limited to, any of three categories:
 - i. Regional Support – Provides an allocation that contributes to the financial stability of public universities and ensures geographic access to public higher education for Oregonians. Regional Support values are established in OAR 715-013-0040 Section 3, Table 2.
 - ii. Mission Support – Provides an allocation to support public university programming consistent with the mission of public higher education as articulated in ORS 351.001. This Section will support efforts consistent with, but not limited to public services, cross-sector or cross-institutional programs, undergirding of university operations support, specific academic programs or other efforts by public universities. Mission Support values are established in OAR 715-013-0040 Section 3 Table 2.
 - iii. Research Support – Provides an allocation to support research activities conducted by the public universities. Research Support values are established in OAR 715-013-0040 Section 3 Table 2.

- iv. Dual Credit-Dual credit provides an allocation to support those students who are enrolled in Dual Credit programs. The value of SCH awarded in Dual Credit programs are is established in OAR 715-013-0040 Section 4 Table 3.
- v. Mission Differential Funding will change from fiscal year to fiscal year by the lessor of Inflation or the change in PUSF funding.

(b) Activity-Based Allocation is determined by the total, cost weighted, completed, resident SCH at a public university consistent with the following methodology.

- i. The most recent three-year average of resident SCH completions by CIP produced by each public university will be used to determine the Activity-Based Allocation.
- ii. Relative cost weights, by CIP and SCH level, will be utilized to differentiate the weighted value of completed SCH. Relative values will be determined by the HECC for programs by CIP identified discipline and by level, including lower division undergraduate, upper division undergraduate, Master's, and Doctoral levels. Relative cost weights are established in OAR 715-013-0040 Section 5 Table 4.
- iii. The combined value of completed SCH at a public university, relative to total completed SCH at all public universities, as adjusted by cost weighting will determine the proportional share of Activity-Based Allocation allocated to each institution.

(c) Outcomes-Based Allocation is determined by the total cost weighted degrees produced, student type and priority area consistent with the following methodology.

- i. The most recent three-year average of degrees conferred by public universities to resident students will be used to determine the Outcomes-Based Allocation. Degrees are categorized by level, including Baccalaureate, Masters, Doctoral, Professional, and Graduate Certificates. The HECC will determine the relative weighting of degree level as established in OAR 715-013-0040 Section 6 Table 5.
- ii. The HECC will adjust the relative value of degrees due to the cost of delivering these degrees. These cost weighting factors of degrees are established in OAR 715-013-0040 Section 7 Table 6.
- iii. The HECC will set the relative value of priority degrees which are of particular interest to the state of Oregon. This includes an emphasis on those that lead to employment in underserved high-demand and high-reward fields or those that fill a unique need. The HECC will solicit input from applicable state agencies, public universities and stakeholders to evaluate the expected labor force needs and identify what priority degree types, if any, exist. This will be reexamined by the HECC no less than once every five years. Degree areas of particular priority to the state and their relative value are established in OAR 715-013-0040 Section 8 Table 7.
- iv. Degrees awarded to resident students receiving Bachelor's Degrees who represented one or more targeted student population characteristics identified as having lower completion rates, lower participation rates or other unique needs or qualifications may be prioritized by the HECC. The HECC will solicit input from applicable state agencies, public universities and stakeholders to identify what priority student populations, if any, exist. These weights are established in OAR 715-013-0040 Section 9 Table 8.
- v. The HECC shall discount the value of Bachelor's Degrees awarded to transfer students at a rate established in OAR 715-013-0040 Section 10 Table 9.
- vi. A degree awarded with multiple majors to one student is treated as a single degree in the discipline with the greatest relative value as established in OAR 715-013-0040 Section 7 Table 6.

- vii. The combined relative values of degree type and level, priority degrees, and degrees to targeted populations at a public university relatively to the total at all public universities will determine the proportional share of Outcomes-Based Allocation allocated to each public university.
- (7) The cumulative results of the Mission Differentiation Funding, Activity-Based Allocation and Outcomes-Based Allocation shall be adjusted by the HECC during a four-year phase-in period beginning in Fiscal Year 2016 and concluding in Fiscal Year 2020. This transition period is designed to maintain relative stability and predictability throughout the transition period. Two operations may be performed in determining any such adjustment: Stop Loss and Stop Gain. The Stop Loss and Stop Gain calculations function as defined in Section 1. Fiscal Year 2016 baseline figures shall be Fiscal Year 2015 allocations by program. Thereafter the prior year allocation will serve as the basis for the Stop Loss and Stop Gain calculation. The HECC will establish a threshold of change that trigger the Stop Loss redistribution of Activity-Based and Outcomes-Based allocation. The HECC will establish a threshold of change that trigger the Stop Gain redistribution of Activity-Based and Outcomes-Based allocation. The values for Stop Loss and Stop Gain thresholds are established in OAR 715-013-0040 Section 11 Table 10.
- (8) Allotments are made quarterly with timing and amounts determined by agreement between the HECC and the Department of Administrative Services.
- (9) Deference to legislative designation of specific resources as part of the PUSF will be computed outside of the SSCM until such allocations expire, are made a part of PUSF CSL budget or are adopted by OAR into the SSCM.
- (10) Non-PUSF income to a public university such as tuition, auxiliary revenue or private philanthropy will not be included in the SSCM.
- (11) Weighting factors and data definitions within the SSCM will be examined by HECC staff and stakeholders as appropriate. This reexamination will occur no less than once every biennium. During the even numbered year of every third biennium the Executive Director of the HECC will convene a workgroup of stakeholders and HECC staff to recommend changes to the SSCM to match the strategic priorities of the state of Oregon and the HECC as appropriate.
- (12) The HECC delegates administrative authority to the Executive Director or designee to operationalize the Student Success and Completion Model and the procedures outlined in this Administrative Rule.
- (13) This rule shall become effective on July 1, 2015.

Statutory Authority: ORS 351.735(3)(d), 351.735(6)

Statutes Implemented: 2013 SB 270, 2013 HB 3120, 2014 HB 4018 2014 SB 1525

Public University Support Fund Distribution Factors

- (1) The purpose of this rule is to list the relative weights and values of factors to be used in the Students Success and Completion Model calculation as defined in OAR 715-013-0025. All terms are defined as they are in Section 1 of OAR 715-013-0025.
- (2) Mission Differentiation Allocation shall be allocated to institutions before Outcomes-Based and Activity-Based Allocations. Funds remaining within the PUSF, excepting those funds otherwise demarcated, after Mission Differentiation Funding is allocated shall then be allocation between Outcomes-Based Allocation and Activity-Based Allocation according to the proportion outlined below:

Table 1		Activity-Based and Outcomes-Based Funding Proportions				
Fiscal Year	2016	2017	2018	2019	2020	
Outcomes-Based Allocation Proportion	20%	40%	60%	60%	60%	
Activity-Based Allocation Proportion	80%	60%	40%	40%	40%	

The proportional funding split between Outcomes-Based Allocation and Activity-Based Allocation after Fiscal Year 2020 shall continue at same proportion as in Fiscal Year 2020.

- (3) The Mission Differentiation Funding allocation for Fiscal Year 15 is as follows. This Mission Differentiation Funding allocation shall serve as the basis for subsequent Mission Differentiation Allocations of the PUSF. Following Fiscal Year 2015, the Mission Differentiation Funding Allocation will change by the lesser of Inflation or the overall change in the PUSF except where indicated below:

Table 2		Mission Differentiation Funding					
REGIONAL SUPPORT							
	EOU	OIT	OSU1	PSU	SOU	UO	WOU
Regional University Support Adjustment ²	\$2,835,488	\$ 2,696,084	\$ 2,490,212		\$ 1,907,486		\$1,522,848
Retrenchment	\$194,777	\$194,874	\$129,904		\$194,867		\$194,832
Retention & Graduation	\$340,860	\$ 341,028	\$227,331		\$341,019		\$ 340,955
Underpinning	\$340,860	\$341,028	\$227,331		\$341,019		\$340,955
11-13 Regional Support	\$790,141	\$790,141			\$790,142		\$790,141
Regional Access	\$848,153	\$365,155			\$273,858		\$91,272
EOU Supplemental Support ³	\$1,991,360						

IT Fifth Site	\$478,020	\$478,020			\$478,020		\$478,020
TRU Shared Services ⁴	\$1,489,522	\$1,521,622			\$1,681,992		\$1,260,448

1

OSU's allocation includes both the allocation for the main Corvallis campus and the OSU Cascades Campus in Bend.

2
Regional University Support Adjustment provides \$601 per FTE for every FTE below 7,500 FTE at an institution. OSU-Cascades FTE is calculated separately from OSU Corvallis campus and is awarded 60% of per FTE value indicated above. The per FTE appropriation will change by the same rule as other Mission Differential Funding line items.

3
EOU Supplemental Support begins in Fiscal Year 2016 at the dollar figure indicated and will change by the same rule as other Mission Differential Funding items thereafter.

4
TRU Shared Services begin at Fiscal Year 2016 at the dollar figure indicated and are allocated after any Stop Loss or Stop Gain allocations for Fiscal Year 2016 only. Thereafter TRU Shared Services are allocated within the Mission Differentiation Allocation and shall change by the same rule as other Mission Differential Funding items.

RESEARCH SUPPORT

	EOU	OIT	OSU	PSU	SOU	UO	WOU
Sponsored Research	\$43,308	\$16,507	\$2,119,115	\$351,361	\$33,012	\$1,043,161	\$124,459
Faculty Salaries - Research	\$38,995	\$65,026	\$ 592,283	\$509,955	\$ 92,477	\$694,197	\$67,901

MISSION SUPPORT

	EOU	OIT	OSU	PSU	SOU	UO	WOU
UO Law Underpinning						\$602,643	
OSU Pharmacy Underpinning			\$1,035,077				
OSU Veterinary Medicine Underpinning			\$3,454,488				
OIT Terminal Health Programs Underpinning ¹		\$200,000					
Engineering Technology Undergraduate ²		\$1,504,281		\$6,930			
Engineering Graduates ³		\$28,259	\$2,267,071	\$594,318			
Collaborative Nursing Program	\$ 22,049	\$12,942			\$37,239		\$24,445
Regional Solutions	\$13,092		\$13,092	\$13,092		\$13,092	
Statewide Access		\$ 830,642					
Campus Public Service Programs	\$221,924			\$570,890	\$ 99,008	\$541,094	\$1,525

Bldg. Maintenance / SWPS			\$1,784,820				
OCATE				\$582,869			
Southwestern Oregon University Center (SOUC)	\$112,718						
OWEN						\$404,461	
Systemwide Expenses / Programs ⁴	\$55,268	\$52,517	\$780,126	\$239,294	\$126,784	\$ 695,421	\$147,622
Veterinary Diagnostic Lab			\$1,226,077				
Health Professions Programs	\$276,031	\$2,264,004			\$380,845		\$307,927
PSU-NEW Leadership Oregon				\$65,468			
Rural Access	\$253,079						
PSU-Oregon Biodiversity Information Center				\$49,334			

1
OIT Terminal Health Programs Underpinning begins in Fiscal Year 2013 at the dollar figure indicated will change by the same rule as other Mission Differential Funding items thereafter.

2
Engineering Technology Undergraduate provides supplemental FTE funding for undergraduate enrollment in Engineering Technology. Total funding will change by the same rule as Mission Differential Funding and is allocated based on institutional undergraduate FTE in CIP 15.

3 Engineering Graduates provides supplemental FTE funding for graduate enrollment in Engineering. Total funding and will change by the same rule as Mission Differential Funding and is allocated based on institutional graduate FTE in CIP 14.

4
State Assessments provided in Fiscal Year 15 will be discontinued from the Systemwide Expenses / Programs line.

(4) Dual Credit Student Credit Hours (SCH) will be rewarded as follows:

Table 3		Dual Credits
Allocation per SCH		\$50.00

(5) The relative cost weights for SCH completions shall be as follows:

Table 4		SCH Cost Weighting			
CIP	Description	Fr./Soph.	Jr/Sr.	Mast./Prof.	Ph.D.
01	Agriculture	1.8	2.44	2.82	3.27
02	Agricultural Sciences (Legacy)	1.8	2.44	2.82	3.27
03	Natural Resources, Conservation	1.0	1.29	1.45	2.73
04	Architecture	1.8	2.44	1.96	2.73
05	Area, Ethnic, Cultural, Gender, Group Studies	1.0	1.29	1.45	2.73
09	Communication, Journalism	1.26	1.61	1.96	3.27

10	Communication, Technologies	1.26	1.61	1.96	2.73
11	Computer and Information Science	1.26	1.81	2.82	4.13
13	Education	1.26	1.61	1.45	3.27
14	Engineering	1.8	2.44	2.82	4.13
15	Engineering Technologies	1.8	2.44	2.82	3.73
16	Foreign Languages, Literatures, Linguistics	1.0	1.29	1.96	2.73
19	Family and Consumer Sciences	1.26	1.61	1.96	3.27
22	Legal Professions and Studies	-	-	3.1	2.73
23	English Language and Literature	1.0	1.29	1.96	3.27
24	Liberal Arts and Science, Humanities	1.0	1.29	1.45	2.73
25	Library Science	1.26	1.61	1.45	2.73
26	Biological and Biomedical Sciences	1.26	1.61	2.82	3.27
27	Mathematics and Statistics	1.0	1.29	2.82	3.27
28	Military Science, Leadership, Operational Art	1.0	1.29	1.45	2.73
29	Military Technologies	1.0	1.29	1.45	2.73
30	Multi/Interdisciplinary Studies	1.26	1.61	2.82	3.27
31	Parks, Rec, Leisure, Fitness Studies	1.8	2.44	1.96	3.27
32	Basic Skills, Developmental/Remedial Education	1.0	1.29	1.45	2.73
34	Health Related Knowledge and Skills	-	-	-	-
38	Philosophy and Religious Studies	1.0	1.29	1.45	3.27
40	Physical Sciences	1.26	1.61	2.82	3.27
41	Science Technologies	1.8	2.44	2.82	4.13
42	Psychology	1.0	1.29	1.45	3.27
43	Homeland Security, Law Enforce, Protective Service	1.26	1.61	1.45	3.27
44	Public Administration and Social Services	1.26	1.61	1.45	3.27
45	Social Sciences and History	1.0	1.29	1.45	3.27
50	Visual and Performing Arts	1.8	2.44	1.96	3.27
51	Health Professions, Related Programs	1.8	2.44	1.96	2.73
51.20	Pharmacy	2.72	2.72	3.99	8.28
51.24	Veterinary Medicine	-	-	11.66	-
52	Business, Mgmt, Marketing, Related Support Svcs	1.26	1.61	1.45	4.13
54	History	1.0	1.29	1.45	3.27
9999	Unknown	1.0	1.29	1.45	2.73

(6) The relative weighting for degree completions by resident students, by degree level, shall be as follows:

Table 5		Degree Level Weighting	
Degree Level	Weight		
Baccalaureate Degrees	2.0		
Masters Degrees	1.0		
Doctorate Degrees	1.4		
Professional Degrees	1.0		
Graduate Certificates	0.2		

(7) The Cost Weighting factors for degree completion are determined by CIP and degree level and shall be as follows:

Table 6		Degree Cost Weighting		
CIP	Description	BA/BS	Masters/Prof/Grad. Cert	PhD
01	Agriculture	1.85	2.46	2.86
02	Agricultural Sciences (Legacy)	1.85	2.46	2.86
03	Natural Resources, Conservation	1.0	1.27	2.39
04	Architecture	1.85	1.72	2.39

05	Area, Ethnic, Cultural, Gender, Group Studies	1.0	1.27	2.39
09	Communication, Journalism	1.25	1.72	2.86
10	Communication, Technologies	1.25	1.72	2.39
11	Computer and Information Science	1.25	2.46	3.61
13	Education	1.25	1.27	2.86
14	Engineering	1.85	2.46	3.61
15	Engineering Technologies	1.85	2.46	2.39
16	Foreign Languages, Literatures, Linguistics	1.0	1.72	2.39
19	Family and Consumer Sciences	1.25	1.72	2.86
22	Legal Professions and Studies	1.0	1.27	2.86
23	English Language and Literature	1.0	1.72	2.86
24	Liberal Arts and Science, Humanities	1.0	1.27	2.39
25	Library Science	1.25	1.27	2.39
26	Biological and Biomedical Sciences	1.25	2.46	2.86
27	Mathematics and Statistics	1.0	2.46	2.86
28	Military Science, Leadership, Operational Art	1.0	1.27	2.39
29	Military Technologies	1.0	1.27	2.39
30	Multi/Interdisciplinary Studies	1.25	1.72	3.61
30.01	Biological and Physical Sciences	1.25	1.72	3.61
30.06	Systems Science and Theory	1.25	1.72	3.61
30.08	Mathematics and Computer Science	1.25	1.72	3.61
30.18	Natural Sciences	1.25	1.72	3.61
31	Parks, Rec, Leisure, Fitness Studies	1.85	1.72	2.86
32	Basic Skills, Developmental/Remedial Education	1.0	1.27	2.39
34	Health Related Knowledge and Skills	-	-	-
38	Philosophy and Religious Studies	1.0	1.27	2.86
40	Physical Sciences	1.25	2.46	2.86
41	Science Technologies	1.85	2.46	3.61
42	Psychology	1.0	1.27	2.86
43	Homeland Security, Law Enforce, Protective Service	1.25	1.27	2.86
44	Public Administration and Social Services	1.25	1.27	2.86
45	Social Sciences and History	1.0	1.27	2.86
50	Visual and Performing Arts	1.85	1.72	2.86
51	Health Professions, Related Programs	1.85	1.72	2.39
51.20	Pharmacy	1.25	2.46	2.86
51.24	Veterinary Medicine	1.25	2.46	2.86
52	Business, Mgmt, Marketing, Related Support Svcs	1.25	1.27	3.61
54	History	1.0	1.27	2.86
9999	Unknown	1.0	1.27	2.39

(8) Priority degrees weighting factors, by CIP and category, are established as follows:

Table 7		Priority Degrees	
CIP	Description	Area of Study Weight	Category
11	Computer and Information Sciences	1.2	STEM
14	Engineering	1.2	STEM
15	Engineering Technologies	1.2	STEM
26	Biological and Biomedical Sciences	1.2	STEM
27	Mathematics and Statistics	1.2	STEM

30.01	Biological and Physical Sciences	1.2	STEM
30.06	Systems Science and Theory	1.2	STEM
30.08	Mathematics and Computer Science	1.2	STEM
30.18	Natural Sciences	1.2	STEM
40	Physical Sciences	1.2	STEM
51	Health Professions, Related Programs	1.2	Health
BLE	Bilingual Education	2.2	Bilingual Education

- (9) The additional weights to Bachelor’s degree completions by resident students who are members of one or more Targeted Student Populations shall be as follows:

Table 8		Targeted Student Populations	
Number of Targeted Student Population Categories		Weight	
1		0.8	
2		1.0	
3		1.1	
4		1.2	

- (10) Weights for Bachelor’s Degrees awarded to transfer students shall be discounted as follows:

Table 9		Transfer Student Discount Factor	
Bachelor’s Degree Discount Factor:		62.54%	

- (11) During the phase-in period, the HECC shall incorporate a Stop Loss and Stop Gain threshold as established in this section.

- a. Stop Loss and Stop Gain thresholds are established as follows:

(12) Table 10		Stop Loss and Stop-Gain			
Fiscal Year	2016	2017	2018	2019	2020
Stop Loss	4.5%	2.0%	1.0%	0.0%	Disengaged
Stop Gain	1.5 x ΔPUSF	2016+10%	2017+10%	2018+10%	Disengaged

Where |ΔPUSF| is equal to Fiscal Year 2016 PUSF allocation less legislative designated funds and TRU Shared Services as a proportion of total Fiscal Year 2015 PUSF allocation.

- b. If, during Fiscal Year 2016 through Fiscal Year 2020 the year-over-year change in the PUSF is less than the Stop Loss threshold for that fiscal year the designated Stop Loss is reset to the year-over-year change in the PUSF, such that the change in funding level for all public universities is pro rata.

- (13) This rule shall become effective on July 1, 2015.

Statutory Authority: ORS 351.735(3)(d), 351.735(6)

Statutes Implemented: 2013 SB 270, 2013 HB 3120, 2014 HB 4018 2014 SB 1525

Clinical Legal Education Program

(1) Definitions

- (a) “ABA-Approved Law School” is a law school approved by the American Bar Association (ABA) to confer Juris Doctor (JD) Degrees.
- (b) “Accredited Institution of Higher Education” is an institution of higher education that is accredited by an accrediting institution authorized by the US Department of Education.
- (c) “Civil Legal Services” are services provided to individuals for non-criminal civil matters and operated in concert with regulations adopted by the Oregon State Bar pursuant to ORS 9.572.
- (d) “Clinical Legal Education Program” is the program authorized by ORS 21.007 and provided by an ABA-Approved Law School at and Accredited Institution of Higher Education granting law students an opportunity to practice law in a particular area during their legal education. Clinical Legal Education Program funds are designated by the legislature on a biennial basis.
- (e) “Eligible Accredited Institution of Higher Education” is an Accredited Institution of Higher Education for which the HECC has certified its compliance with Section 5 of this OAR to receive Civil Legal Education Program funds.
- (f) The “Higher Education Coordinating Commission” or “HECC” is the body established by ORS 351.715 and appointed by the Governor.
- (g) “Oregon State Bar” is a public corporation established by ORS 9.010 to license and discipline lawyers, regulate the practice of law, and provide a variety of services to bar members and the public.

(2) This rule allocates Civil Legal Education Program funds to Eligible Accredited Institutions of Higher Education.

(3) Allocations in the first year of any biennium shall be 49% of the total appropriated to the Domestic Violence Clinical Legal Education Account. The remainder shall be allocated in the second year of the biennium.

(4) Civil Legal Education Program funds are distributed in order to provide civil legal services to victims of stalking, domestic violence and assault.

(5) In order to be eligible for funding under this program, institutions must meet the following conditions;

- (a) Be an accredited institution of higher education and have an ABA-approved law school.
- (b) Certify that the institution has a clinical legal education program that includes Civil Legal Services.
- (c) Certify that the Clinical Legal Education Program represents clients of domestic violence, stalking or sexual assault.
- (d) Certify that the Clinical Legal Education Program operates in concert with at least one nonprofit service provider that provides advocacy services such as counseling, safety-planning and/or shelter to victims of domestic violence, stalking or sexual assault and that this provider performs victims counseling services and provides student training

(6) Once an institution certifies to the HECC their compliance with Section 5 they need not apply every year but must recertify their eligibility on an annual basis.

(7) All institutions certified as eligible and seeking funds shall submit an annual report including the following:

- (a) Number of clients that are victims of domestic violence, stalking or sexual assault.
- (b) Nature of legal issues involved.
- (c) Outcomes of the legal issues.
- (d) Categorization of victim service between, sexual assault, stalking and domestic violence.
- (e) Relationship of the client to the offender.
- (f) Whether advocacy services were provided.

(8) The HECC shall award funds to institutions on a proportional basis in relation to the number of victims served.

- (a) Proportions shall be calculated on an annual basis.
- (b) If only one institution is eligible to receive funds in a given fiscal year, it shall receive all available funds in a given fiscal year.

(9) The HECC will give deference to any legislative designation of specific resources or policy decisions when making determinations on allocation of funds.

Statutory Authority: ORS 351.735(5),

Statutes Implemented: ORS 351.735(3) (iii)(f), ORS 21.007

Engineering Technology Sustaining Funds

(1) Definitions

- (a) “Engineering and Technology Industry Council” or “ETIC” was the body established by ORS 351.663 and abolished by Section 5, Chapter 682 Oregon Laws 2015, for the purposes of improving engineering education in the state of Oregon.
 - (b) The “Higher Education Coordinating Commission” or “HECC” is the body established by ORS 351.715 and appointed by the Governor.
 - (c) “Historical Funding” is funding based upon a university’s historical allocation of ETIC Sustaining Funds in fiscal year 2015 as approved by the Oregon Education Investment Board (OEIB).
 - (d) “Oregon Education Investment Board (OEIB)” was the body established by section 1, chapter 519, Oregon Laws 2011 and appointed by the Governor.
 - (e) “Oregon Health and Science University (OHSU)” is an independent public corporation established by ORS 353.020.
 - (f) “Oregon Students, Oregon Jobs Model” is defined as the model that had been developed by ETIC and submitted to the HECC to award funds based on placement of Oregon resident graduates in Oregon jobs.
 - (g) A “Public University” is any institution as defined in ORS 352.002, including; Eastern Oregon University (EOU), Oregon Institute of Technology (OIT), Oregon State University (OSU), Portland State University (PSU), Southern Oregon University (SOU), University of Oregon (UO) and Western Oregon University (WOU).
 - (h) “Sustaining Funds” are funds designated by the Legislature as legacy ETIC Sustaining Funds.
- (2) This rule allocates Sustaining Funds to Public Universities and OHSU for the 2015-17 biennium.
- (3) Allocations in the first year of any biennium shall be 49% of total appropriated for the biennium. The remainder shall be allocated in the second year of the biennium.
- (4) Sustaining Funds are to be spent in support of engineering and technology related programs in support of Oregon industry.
- (5) Allocations shall be made by the HECC to Public Universities and OHSU for the fiscal year beginning on July 1, 2015 as follows;
- (a) 80% of available funds shall be allocated on the basis of Historical Funding. (A) Of these funds, the allocations shall be as follows;
 - (i) Eastern Oregon University shall receive \$144,601. Oregon Health Sciences University shall receive no historical funding.
 - (ii) Oregon Institute of Technology shall receive \$444,592.
 - (iii) Oregon State University shall \$6,179,323.
 - (iv) Portland State University shall receive \$2,410,166.
 - (v) Southern Oregon University shall receive \$168,447.
 - (vi) The University of Oregon shall receive no historical funding.
 - (vii) Western Oregon University shall receive \$237,770.
- (b) 20% of available funds shall be allocated in the proportions indicated by the Oregon Students, Oregon Jobs Model. (A) Of these funds, the allocations shall be as follows; (i) Eastern Oregon University shall receive \$10,814.
- (ii) Oregon Health Sciences University shall receive no funds.
 - (iii) Oregon Institute of Technology shall receive \$513,415.
 - (iv) Oregon State University shall receive \$862,072.
 - (v) Portland State University shall receive \$771,841.
 - (vi) Southern Oregon University shall receive \$67,688.
 - (vii) The University of Oregon shall receive \$107,892.
 - (viii) Western Oregon University shall receive \$62,503.
- (6) Allocations shall be made by the HECC to public universities and OHSU for the fiscal year beginning July 1, 2016 as follows;
- (a) Funding to each public university shall continue in amounts equal to those in section 5. (b) The additional funds available shall be allocated to institutions which have not reached funding indicated in the Oregon Student, Oregon Jobs Model. (A) Of these funds, the allocations shall be as follows:

- (i) Eastern Oregon University shall receive no funds.
- (ii) Oregon Health Sciences University shall receive no funds.
- (iii) Oregon Institute of Technology shall receive \$287,431.
- (iv) Oregon State University shall receive no funds.
- (v) Portland State University shall receive \$105,785.
- (vi) Southern Oregon University shall receive \$17,318.
- (vii) The University of Oregon shall receive \$77,906.
- (viii) Western Oregon University shall receive \$586.

(7) The continued allocation of Historical Funding is contingent upon institutions maintaining performance consistent with past efforts.

(8) The HECC will give deference to any legislative designation of specific resources or policy decisions when making determinations on allocation of funds.

Statutory Authority: ORS 351.735(5)

Statutes Implemented: ORS 351.735(3) (ii)(f), Chapter 682 Oregon Laws 2015

Signature Research Centers

(1) Definitions

- (a) The “Higher Education Coordinating Commission” or “HECC” is the body established by ORS 351.715 and appointed by the Governor.
 - (b) “Oregon Growth Business” is defined in ORS 284.701(3) as an individual, group of individuals or private sector business entity, including but not limited to a partnership, limited liability company, corporation, firm, association or other business entity, that engages in business that furthers innovation-based economic development, that has the capacity, upon obtaining appropriate capital, to generate significant high-skill, high-wage employment in Oregon and that conducts business in Oregon or an emerging growth business consisting of an individual or group of individuals or a new or small company, including but not limited to any new or small partnership, limited liability company, corporation, firm, association or other business entity, that has the capacity, upon obtaining appropriate capital, to generate significant high-skill, high-wage employment.
 - (c) “Public Entity” is defined in ORS 284.701(4) as any agency of the federal or state government, county, city, town, public corporation or political subdivision in this state.
 - (d) A “Public University” is any institution as defined in ORS 352.002, including; Eastern Oregon University (EOU), Oregon Institute of Technology (OIT), Oregon State University (OSU), Portland State University (PSU), Southern Oregon University (SOU), University of Oregon (UO) and Western Oregon University (WOU).
 - (e) “Research Institution” is defined in ORS 284.701(5) to include Community Colleges, Public Universities, Oregon Health and Science University, Oregon-based generally accredited non-for-profit private institutions of higher education, federal research laboratories conducting research in Oregon, private not-profit research institutions located in Oregon, institutions for higher education as defined in ORS 289.005 or private institutions of higher education located in Oregon.
 - (f) “Signature Research Centers” are those authorized under ORS 284.740 to maximize collaborative ventures between Research Institutions, Public Entities and Oregon Growth Industries. Signature Research Center funds are designated by the Legislature.
- (2) This rule allocates Signature Research Center funds to Public Universities.
- (3) Allocations in the first year of any biennium shall be 49% of the total appropriated. The remainder shall be allocated in the second year of the biennium.
- (4) Signature Research Center funds are to be spent on expenses related to collaborative ventures among Research Institutions, Public Entities and Oregon Growth Businesses that seek to capitalize on opportunities to obtain private and federal funding for the research and development of innovation-based economic development.
- (5) The University of Oregon and Oregon State University shall each receive 47.5% of all appropriated funds each biennium and Portland State University shall receive 5% of all appropriated funds.
- (6) The HECC will give deference to any legislative designation of specific resources or policy decisions when making determinations on allocation of funds.

Statutory Authority: ORS 351.735(5),

Statutes Implemented: ORS 351.735(3) (iii)(f), ORS 284.720, ORS 284.701

Dispute Resolution Centers

(1) Definitions

- (a) “Dispute Resolution Account” is an account established in the state treasury by ORS 36.145 to appropriate funds for the purposes outlined in ORS 36.135, ORS 36.175 and ORS 36.179 to the University of Oregon and Portland State University.
 - (b) “Dispute Resolution Programs” are programs authorized by ORS 36.100, ORS 36.135, ORS 36.155 and ORS 36.179 for the purposes indicated in ORS 36.105. Dispute Resolution Program funds are designated by the legislature.
 - (c) “Dispute Resolution Services in Counties” are established under standards adopted by the Board of Trustees of the University of Oregon pursuant to ORS 36.155.
 - (d) The “Higher Education Coordinating Commission” or “HECC” is the body established by ORS 351.715 and appointed by the Governor.
 - (e) “Mediation and Alternative Means of Dispute Resolution” is the program authorized by ORS 36.179 providing mediation and other alternative dispute resolution services to public bodies at the Mark O Hatfield School of Government at Portland State University.
 - (f) A “Public University” is any institution as defined in ORS 352.002, including; Eastern Oregon University (EOU), Oregon Institute of Technology (OIT), Oregon State University (OSU), Portland State University (PSU), Southern Oregon University (SOU), University of Oregon (UO) and Western Oregon University (WOU).
- (2) This rule allocates Dispute Resolution Program funds to Public Universities.
- (3) Allocations in the first year of any biennium shall be 49% of the total appropriated to Dispute Resolution Programs. The remainder shall be allocated in the second year of the biennium.
- (4) Dispute Resolution Program funds for the University of Oregon are to be spent in compliance with standards adopted pursuant to ORS 36.155 and in compliance with state policy pursuant to ORS 36.100 and ORS 36.105.
- (5) Dispute Resolution Program funds for Portland State University are to operate the program authorized in ORS 36.179 and in compliance with state policy pursuant to ORS 36.100 and ORS 36.105.
- (6) The University of Oregon shall receive 65% of Dispute Resolution Program funds each biennium and Portland State University shall receive 35% of Dispute Resolution Program funds.
- (7) The HECC will give deference to any legislative designation of specific resources or policy decisions when making determinations on allocation of funds.

Statutory Authority: ORS 351.735(5), ORS 36.100, ORS 36.135, ORS 36.145, ORS 36.155, ORS 36.179

Statutes Implemented: ORS 351.735(3)(iii)(f) ORS 36.105, ORS 36.145

APPENDIX E: SSCM COST WEIGHTING AND DATA

Student credit hour (SCH) completion cost weighting

SCH cost weighting in the SSCM is retained from the RAM. The RAM used the following matrix to establish relative funding levels between CIP codes and student levels.

2013-14 Discounted Value (2014 Ram)				
Cell Funding Group	Lower Division Undergraduate	Upper Division Undergraduate	Master's Graduate	PhD Graduate
Level 0	\$ -	\$ -	\$ -	\$ -
Level 1	\$ 1,636	\$ 2,106	\$ 2,374	\$ 4,469
Level 2	\$ 2,054	\$ 2,629	\$ 3,212	\$ 5,354
Level 3	\$ 2,942	\$ 3,987	\$ 4,609	\$ 6,751
Level 4 (Law)	\$ -	\$ -	\$ 5,075	\$ 4,469
Level 5 (Pharmacy)	\$ 4,457	\$ 4,457	\$ 6,523	\$ 13,549
Level 6 (Vet Med)	\$ -	\$ -	\$ 19,069	\$ -

The following table reports the levels of each CIP/student level combination. The highlighted rows are adjusted in the SSCM to reflect Mission Differentiation underpinning funding provided to several specific programs.

CIP	Description	1_fr_so	2_jr_sr	3_ma	4_phd
01	Agriculture	3	3	3	2
02	Agricultural Sciences (Legacy)	3	3	3	2
03	Natural Resources, Conservation	1	1	1	1
04	Architecture	3	3	2	1
05	Area, Ethnic, Cultural, Gender, Group Studies	1	1	1	1
09	Communication, Journalism	2	2	2	2
10	Communications Technologies	2	2	2	1
11	Computer and Information Science	2	2	3	3
13	Education	2	2	1	2
14	Engineering	3	3	3	3
15	Engineering Technologies	3	3	3	1
16	Foreign Languages, Literatures, Linguistics	1	1	2	1
19	Family and Consumer Sciences	2	2	2	2
22	Legal Professions and Studies	1	1	1	2
23	English Language and Literature	1	1	2	2
24	Liberal Arts and Sciences, Humanities	1	1	1	1
25	Library Science	2	2	1	1
26	Biological and Biomedical Sciences	2	2	3	2
27	Mathematics and Statistics	1	1	3	2
28	Military Science, Leadership, Operational Art	1	1	1	1
29	Military Technologies	1	1	1	1
30	Multi/Interdisciplinary Studies	2	2	2	3
30.01	Multi/Interdisciplinary Studies	2	2	2	3
30.06	Multi/Interdisciplinary Studies	2	2	2	3
30.08	Multi/Interdisciplinary Studies	2	2	2	3
30.18	Multi/Interdisciplinary Studies	2	2	2	3
31	Parks, Rec, Leisure, Fitness Studies	3	3	2	2
32	Basic Skills, Developmental/Remedial Education	1	1	1	1
34	Health Related Knowledge and Skills	0	0	0	0
38	Philosophy and Religious Studies	1	1	1	2
40	Physical Sciences	2	2	3	2
41	Science Technologies	3	3	3	3
42	Psychology	1	1	1	2
43	Homeland Security, Law Enforce, Protective Services	2	2	1	2
44	Public Administration and Social Services	2	2	1	2
45	Social Sciences and History	1	1	1	2
50	Visual and Performing Arts	3	3	2	2
51	Health Professions, Related Programs	3	3	2	1
51.20	Pharmacy	2	2	3	2
51.24	Veterinary Medicine	2	2	3	2
52	Business, Mgmt, Marketing, Related Support Svcs	2	2	1	3
54	History	1	1	1	2
9999	Unknown	1	1	1	1

Using the above two tables, an index is created for use in the SSCM, setting the relative cost weight of each CIP/student level combination. Those relative cost weights are summarized in the next table.

CIP	Description	2016			
		1_fr_so	2_jr_sr	3_ma	4_phd
01	Agriculture	1.80	2.44	2.82	3.27
02	Agricultural Sciences (Legacy)	1.80	2.44	2.82	3.27
03	Natural Resources, Conservation	1.00	1.29	1.45	2.73
04	Architecture	1.80	2.44	1.96	2.73
05	Area, Ethnic, Cultural, Gender, Group Studies	1.00	1.29	1.45	2.73
09	Communication, Journalism	1.26	1.61	1.96	3.27
10	Communications Technologies	1.26	1.61	1.96	2.73
11	Computer and Information Science	1.26	1.61	2.82	4.13
13	Education	1.26	1.61	1.45	3.27
14	Engineering	1.80	2.44	2.82	4.13
15	Engineering Technologies	1.80	2.44	2.82	2.73
16	Foreign Languages, Literatures, Linguistics	1.00	1.29	1.96	2.73
19	Family and Consumer Sciences	1.26	1.61	1.96	3.27
22	Legal Professions and Studies	1.00	1.29	1.45	3.27
23	English Language and Literature	1.00	1.29	1.96	3.27
24	Liberal Arts and Sciences, Humanities	1.00	1.29	1.45	2.73
25	Library Science	1.26	1.61	1.45	2.73
26	Biological and Biomedical Sciences	1.26	1.61	2.82	3.27
27	Mathematics and Statistics	1.00	1.29	2.82	3.27
28	Military Science, Leadership, Operational Art	1.00	1.29	1.45	2.73
29	Military Technologies	1.00	1.29	1.45	2.73
30	Multi/Interdisciplinary Studies	1.26	1.61	1.96	4.13
30.01	Multi/Interdisciplinary Studies	1.26	1.61	1.96	4.13
30.06	Multi/Interdisciplinary Studies	1.26	1.61	1.96	4.13
30.08	Multi/Interdisciplinary Studies	1.26	1.61	1.96	4.13
30.18	Multi/Interdisciplinary Studies	1.26	1.61	1.96	4.13
31	Parks, Rec, Leisure, Fitness Studies	1.80	2.44	1.96	3.27
32	Basic Skills, Developmental/Remedial Education	1.00	1.29	1.45	2.73
34	Health Related Knowledge and Skills	0.00	0.00	0.00	0.00
38	Philosophy and Religious Studies	1.00	1.29	1.45	3.27
40	Physical Sciences	1.26	1.61	2.82	3.27
41	Science Technologies	1.80	2.44	2.82	4.13
42	Psychology	1.00	1.29	1.45	3.27
43	Homeland Security, Law Enforce, Protective Services	1.26	1.61	1.45	3.27
44	Public Administration and Social Services	1.26	1.61	1.45	3.27
45	Social Sciences and History	1.00	1.29	1.45	3.27
50	Visual and Performing Arts	1.80	2.44	1.96	3.27
51	Health Professions, Related Programs	1.80	2.44	1.96	2.73
51.20	Pharmacy	1.26	1.61	2.82	3.27
51.24	Veterinary Medicine	1.26	1.61	2.82	3.27
52	Business, Mgmt, Marketing, Related Support Svcs	1.26	1.61	1.45	4.13
54	History	1.00	1.29	1.45	3.27
9999	Unknown	1.00	1.29	1.45	2.73
BLE	Bilingual Education	Degree-Only Designation - Not used for SCH.			

These cost weights are used in the SSCM to determine the amount of PUSF allocated to each average SCH in a specific CIP/student level combination.

Degree value tables

Degree level cost weights are based on the SCH cost weights outlined above. BA/BS degrees receive a baseline cost weight equal to the average of the lower division and upper division cost weights for a given CIP. Master's degrees, graduate certificates, and first professional degrees are based on the Master's level SCH cost weight of a given CIP code. Finally, PhD degree cost weighting is based on the PhD SCH cost weight of a given CIP. Once these calculations are done, an index of relative value is created and used in SSCM calculations.

The following tables show the relative weight of degree completions, organized by CIP code and degree level. Each table shows the degree level weight, native cost-weighting based on the former funding model (RAM), Area of Study Bonus for high demand/high value degrees, and total cost weight. Each weight in the total represents the value of one degree produced for each of the three years included in SSCM data. For example, one CIP 01 non-transfer Bachelor's degree produced in each of 2012-13, 2013-14, and 2014-15 averages one degree in SSCM calculations. That one degree equivalent earns 3.70 allocation points in the SSCM.

Non-Transfer BA/BS					
CIP	Description	Degree Level Weight	Base Cost Weight	Area of Study Bonus	Total
01	Agriculture	2.00	1.70	0.00	3.70
02	Agricultural Sciences (Legacy)	2.00	1.70	0.00	3.70
03	Natural Resources, Conservation	2.00	0.00	0.00	2.00
04	Architecture	2.00	1.70	0.00	3.70
05	Area, Ethnic, Cultural, Gender, Group Studies	2.00	0.00	0.00	2.00
09	Communication, Journalism	2.00	0.50	0.00	2.50
10	Communications Technologies	2.00	0.50	0.00	2.50
11	Computer and Information Science	2.00	0.50	0.50	3.00
13	Education	2.00	0.50	0.00	2.50
14	Engineering	2.00	1.70	0.74	4.44
15	Engineering Technologies	2.00	1.70	0.74	4.44
16	Foreign Languages, Literatures, Linguistics	2.00	0.00	0.00	2.00
19	Family and Consumer Sciences	2.00	0.50	0.00	2.50
22	Legal Professions and Studies	2.00	0.00	0.00	2.00
23	English Language and Literature	2.00	0.00	0.00	2.00
24	Liberal Arts and Sciences, Humanities	2.00	0.00	0.00	2.00
25	Library Science	2.00	0.50	0.00	2.50
26	Biological and Biomedical Sciences	2.00	0.50	0.50	3.00
27	Mathematics and Statistics	2.00	0.00	0.40	2.40
28	Military Science, Leadership, Operational Art	2.00	0.00	0.00	2.00
29	Military Technologies	2.00	0.00	0.00	2.00
30	Multi/Interdisciplinary Studies	2.00	0.50	0.00	2.50
30.01	Multi/Interdisciplinary Studies	2.00	0.50	0.50	3.00
30.06	Multi/Interdisciplinary Studies	2.00	0.50	0.50	3.00
30.08	Multi/Interdisciplinary Studies	2.00	0.50	0.50	3.00
30.18	Multi/Interdisciplinary Studies	2.00	0.50	0.50	3.00
31	Parks, Rec, Leisure, Fitness Studies	2.00	1.70	0.00	3.70
32	Basic Skills, Developmental/Remedial Education	2.00	0.00	0.00	2.00
34	Health Related Knowledge and Skills	2.00	-2.00	0.00	0.00
38	Philosophy and Religious Studies	2.00	0.00	0.00	2.00
40	Physical Sciences	2.00	0.50	0.50	3.00
41	Science Technologies	2.00	1.70	0.00	3.70
42	Psychology	2.00	0.00	0.00	2.00
43	Homeland Security, Law Enforce, Protective Services	2.00	0.50	0.00	2.50
44	Public Administration and Social Services	2.00	0.50	0.00	2.50
45	Social Sciences and History	2.00	0.00	0.00	2.00
50	Visual and Performing Arts	2.00	1.70	0.00	3.70
51	Health Professions, Related Programs	2.00	1.70	0.74	4.44
51.20	Pharmacy	2.00	0.50	0.00	2.50
51.24	Veterinary Medicine	2.00	0.50	0.00	2.50
52	Business, Mgmt, Marketing, Related Support Svcs	2.00	0.50	0.00	2.50
54	History	2.00	0.00	0.00	2.00
9999	Unknown	2.00	0.00	0.00	2.00
BLE	Bilingual Education	2.00	0.50	3.00	5.51

Transfer BA/BS					
CIP	Description	Degree Level Weight	Base Cost Weight	Area of Study Bonus	Total
01	Agriculture	1.25	1.07	0.00	2.32
02	Agricultural Sciences (Legacy)	1.25	1.07	0.00	2.32
03	Natural Resources, Conservation	1.25	0.00	0.00	1.25
04	Architecture	1.25	1.07	0.00	2.32
05	Area, Ethnic, Cultural, Gender, Group Studies	1.25	0.00	0.00	1.25
09	Communication, Journalism	1.25	0.31	0.00	1.57
10	Communications Technologies	1.25	0.31	0.00	1.57
11	Computer and Information Science	1.25	0.31	0.31	1.88
13	Education	1.25	0.31	0.00	1.57
14	Engineering	1.25	1.07	0.46	2.78
15	Engineering Technologies	1.25	1.07	0.46	2.78
16	Foreign Languages, Literatures, Linguistics	1.25	0.00	0.00	1.25
19	Family and Consumer Sciences	1.25	0.31	0.00	1.57
22	Legal Professions and Studies	1.25	0.00	0.00	1.25
23	English Language and Literature	1.25	0.00	0.00	1.25
24	Liberal Arts and Sciences, Humanities	1.25	0.00	0.00	1.25
25	Library Science	1.25	0.31	0.00	1.57
26	Biological and Biomedical Sciences	1.25	0.31	0.31	1.88
27	Mathematics and Statistics	1.25	0.00	0.25	1.50
28	Military Science, Leadership, Operational Art	1.25	0.00	0.00	1.25
29	Military Technologies	1.25	0.00	0.00	1.25
30	Multi/Interdisciplinary Studies	1.25	0.31	0.00	1.57
30.01	Multi/Interdisciplinary Studies	1.25	0.31	0.31	1.88
30.06	Multi/Interdisciplinary Studies	1.25	0.31	0.31	1.88
30.08	Multi/Interdisciplinary Studies	1.25	0.31	0.31	1.88
30.18	Multi/Interdisciplinary Studies	1.25	0.31	0.31	1.88
31	Parks, Rec, Leisure, Fitness Studies	1.25	1.07	0.00	2.32
32	Basic Skills, Developmental/Remedial Education	1.25	0.00	0.00	1.25
34	Health Related Knowledge and Skills	1.25	-1.25	0.00	0.00
38	Philosophy and Religious Studies	1.25	0.00	0.00	1.25
40	Physical Sciences	1.25	0.31	0.31	1.88
41	Science Technologies	1.25	1.07	0.00	2.32
42	Psychology	1.25	0.00	0.00	1.25
43	Homeland Security, Law Enforce, Protective Services	1.25	0.31	0.00	1.57
44	Public Administration and Social Services	1.25	0.31	0.00	1.57
45	Social Sciences and History	1.25	0.00	0.00	1.25
50	Visual and Performing Arts	1.25	1.07	0.00	2.32
51	Health Professions, Related Programs	1.25	1.07	0.46	2.78
51.20	Pharmacy	1.25	0.31	0.00	1.57
51.24	Veterinary Medicine	1.25	0.31	0.00	1.57
52	Business, Mgmt, Marketing, Related Support Svcs	1.25	0.31	0.00	1.57
54	History	1.25	0.00	0.00	1.25
9999	Unknown	1.25	0.00	0.00	1.25
BLE	Bilingual Education	1.25	0.31	1.88	3.44

Master's					
CIP	Description	Degree Level Weight	Base Cost Weight	Area of Study Bonus	Total
01	Agriculture	1.00	1.46	0.00	2.46
02	Agricultural Sciences (Legacy)	1.00	1.46	0.00	2.46
03	Natural Resources, Conservation	1.00	0.27	0.00	1.27
04	Architecture	1.00	0.72	0.00	1.72
05	Area, Ethnic, Cultural, Gender, Group Studies	1.00	0.27	0.00	1.27
09	Communication, Journalism	1.00	0.72	0.00	1.72
10	Communications Technologies	1.00	0.72	0.00	1.72
11	Computer and Information Science	1.00	1.46	0.49	2.96
13	Education	1.00	0.27	0.00	1.27
14	Engineering	1.00	1.46	0.49	2.96
15	Engineering Technologies	1.00	1.46	0.49	2.96
16	Foreign Languages, Literatures, Linguistics	1.00	0.72	0.00	1.72
19	Family and Consumer Sciences	1.00	0.72	0.00	1.72
22	Legal Professions and Studies	1.00	0.27	0.00	1.27
23	English Language and Literature	1.00	0.72	0.00	1.72
24	Liberal Arts and Sciences, Humanities	1.00	0.27	0.00	1.27
25	Library Science	1.00	0.27	0.00	1.27
26	Biological and Biomedical Sciences	1.00	1.46	0.49	2.96
27	Mathematics and Statistics	1.00	1.46	0.49	2.96
28	Military Science, Leadership, Operational Art	1.00	0.27	0.00	1.27
29	Military Technologies	1.00	0.27	0.00	1.27
30	Multi/Interdisciplinary Studies	1.00	0.72	0.00	1.72
30.01	Multi/Interdisciplinary Studies	1.00	0.72	0.34	2.06
30.06	Multi/Interdisciplinary Studies	1.00	0.72	0.34	2.06
30.08	Multi/Interdisciplinary Studies	1.00	0.72	0.34	2.06
30.18	Multi/Interdisciplinary Studies	1.00	0.72	0.34	2.06
31	Parks, Rec, Leisure, Fitness Studies	1.00	0.72	0.00	1.72
32	Basic Skills, Developmental/Remedial Education	1.00	0.27	0.00	1.27
34	Health Related Knowledge and Skills	1.00	-1.00	0.00	0.00
38	Philosophy and Religious Studies	1.00	0.27	0.00	1.27
40	Physical Sciences	1.00	1.46	0.49	2.96
41	Science Technologies	1.00	1.46	0.00	2.46
42	Psychology	1.00	0.27	0.00	1.27
43	Homeland Security, Law Enforce, Protective Services	1.00	0.27	0.00	1.27
44	Public Administration and Social Services	1.00	0.27	0.00	1.27
45	Social Sciences and History	1.00	0.27	0.00	1.27
50	Visual and Performing Arts	1.00	0.72	0.00	1.72
51	Health Professions, Related Programs	1.00	0.72	0.34	2.06
51.20	Pharmacy	1.00	1.46	0.00	2.46
51.24	Veterinary Medicine	1.00	1.46	0.00	2.46
52	Business, Mgmt, Marketing, Related Support Svcs	1.00	0.27	0.00	1.27
54	History	1.00	0.27	0.00	1.27
9999	Unknown	1.00	0.27	0.00	1.27
BLE	Bilingual Education	1.00	0.27	1.52	2.79

PhD (Resident & Non-Resident)					
CIP	Description	Degree Level Weight	Base Cost Weight	Area of Study Bonus	Total
01	Agriculture	1.40	2.61	0.00	4.01
02	Agricultural Sciences (Legacy)	1.40	2.61	0.00	4.01
03	Natural Resources, Conservation	1.40	1.94	0.00	3.34
04	Architecture	1.40	1.94	0.00	3.34
05	Area, Ethnic, Cultural, Gender, Group Studies	1.40	1.94	0.00	3.34
09	Communication, Journalism	1.40	2.61	0.00	4.01
10	Communications Technologies	1.40	1.94	0.00	3.34
11	Computer and Information Science	1.40	3.65	1.01	6.06
13	Education	1.40	2.61	0.00	4.01
14	Engineering	1.40	3.65	1.01	6.06
15	Engineering Technologies	1.40	1.94	0.67	4.01
16	Foreign Languages, Literatures, Linguistics	1.40	1.94	0.00	3.34
19	Family and Consumer Sciences	1.40	2.61	0.00	4.01
22	Legal Professions and Studies	1.40	2.61	0.00	4.01
23	English Language and Literature	1.40	2.61	0.00	4.01
24	Liberal Arts and Sciences, Humanities	1.40	1.94	0.00	3.34
25	Library Science	1.40	1.94	0.00	3.34
26	Biological and Biomedical Sciences	1.40	2.61	0.80	4.81
27	Mathematics and Statistics	1.40	2.61	0.80	4.81
28	Military Science, Leadership, Operational Art	1.40	1.94	0.00	3.34
29	Military Technologies	1.40	1.94	0.00	3.34
30	Multi/Interdisciplinary Studies	1.40	3.65	0.00	5.05
30.01	Multi/Interdisciplinary Studies	1.40	3.65	1.01	6.06
30.06	Multi/Interdisciplinary Studies	1.40	3.65	1.01	6.06
30.08	Multi/Interdisciplinary Studies	1.40	3.65	1.01	6.06
30.18	Multi/Interdisciplinary Studies	1.40	3.65	1.01	6.06
31	Parks, Rec, Leisure, Fitness Studies	1.40	2.61	0.00	4.01
32	Basic Skills, Developmental/Remedial Education	1.40	1.94	0.00	3.34
34	Health Related Knowledge and Skills	1.40	-1.40	0.00	0.00
38	Philosophy and Religious Studies	1.40	2.61	0.00	4.01
40	Physical Sciences	1.40	2.61	0.80	4.81
41	Science Technologies	1.40	3.65	0.00	5.05
42	Psychology	1.40	2.61	0.00	4.01
43	Homeland Security, Law Enforce, Protective Services	1.40	2.61	0.00	4.01
44	Public Administration and Social Services	1.40	2.61	0.00	4.01
45	Social Sciences and History	1.40	2.61	0.00	4.01
50	Visual and Performing Arts	1.40	2.61	0.00	4.01
51	Health Professions, Related Programs	1.40	1.94	0.67	4.01
51.20	Pharmacy	1.40	2.61	0.00	4.01
51.24	Veterinary Medicine	1.40	2.61	0.00	4.01
52	Business, Mgmt, Marketing, Related Support Svcs	1.40	3.65	0.00	5.05
54	History	1.40	2.61	0.00	4.01
9999	Unknown	1.40	1.94	0.00	3.34
BLE	Bilingual Education	1.40	2.61	4.81	8.81

First Professional Degree					
CIP	Description	Degree Level Weight	Base Cost Weight	Area of Study Bonus	Total
01	Agriculture	1.00	1.46	0.00	2.46
02	Agricultural Sciences (Legacy)	1.00	1.46	0.00	2.46
03	Natural Resources, Conservation	1.00	0.27	0.00	1.27
04	Architecture	1.00	0.72	0.00	1.72
05	Area, Ethnic, Cultural, Gender, Group Studies	1.00	0.27	0.00	1.27
09	Communication, Journalism	1.00	0.72	0.00	1.72
10	Communications Technologies	1.00	0.72	0.00	1.72
11	Computer and Information Science	1.00	1.46	0.49	2.96
13	Education	1.00	0.27	0.00	1.27
14	Engineering	1.00	1.46	0.49	2.96
15	Engineering Technologies	1.00	1.46	0.49	2.96
16	Foreign Languages, Literatures, Linguistics	1.00	0.72	0.00	1.72
19	Family and Consumer Sciences	1.00	0.72	0.00	1.72
22	Legal Professions and Studies	1.00	0.27	0.00	1.27
23	English Language and Literature	1.00	0.72	0.00	1.72
24	Liberal Arts and Sciences, Humanities	1.00	0.27	0.00	1.27
25	Library Science	1.00	0.27	0.00	1.27
26	Biological and Biomedical Sciences	1.00	1.46	0.49	2.96
27	Mathematics and Statistics	1.00	1.46	0.49	2.96
28	Military Science, Leadership, Operational Art	1.00	0.27	0.00	1.27
29	Military Technologies	1.00	0.27	0.00	1.27
30	Multi/Interdisciplinary Studies	1.00	0.72	0.00	1.72
30.01	Multi/Interdisciplinary Studies	1.00	0.72	0.34	2.06
30.06	Multi/Interdisciplinary Studies	1.00	0.72	0.34	2.06
30.08	Multi/Interdisciplinary Studies	1.00	0.72	0.34	2.06
30.18	Multi/Interdisciplinary Studies	1.00	0.72	0.34	2.06
31	Parks, Rec, Leisure, Fitness Studies	1.00	0.72	0.00	1.72
32	Basic Skills, Developmental/Remedial Education	1.00	0.27	0.00	1.27
34	Health Related Knowledge and Skills	1.00	-1.00	0.00	0.00
38	Philosophy and Religious Studies	1.00	0.27	0.00	1.27
40	Physical Sciences	1.00	1.46	0.49	2.96
41	Science Technologies	1.00	1.46	0.00	2.46
42	Psychology	1.00	0.27	0.00	1.27
43	Homeland Security, Law Enforce, Protective Services	1.00	0.27	0.00	1.27
44	Public Administration and Social Services	1.00	0.27	0.00	1.27
45	Social Sciences and History	1.00	0.27	0.00	1.27
50	Visual and Performing Arts	1.00	0.72	0.00	1.72
51	Health Professions, Related Programs	1.00	0.72	0.34	2.06
51.20	Pharmacy	1.00	1.46	0.00	2.46
51.24	Veterinary Medicine	1.00	1.46	0.00	2.46
52	Business, Mgmt, Marketing, Related Support Svcs	1.00	0.27	0.00	1.27
54	History	1.00	0.27	0.00	1.27
9999	Unknown	1.00	0.27	0.00	1.27
BLE	Bilingual Education	1.00	0.27	1.52	2.79

Graduate Certificates					
CIP	Description	Degree Level Weight	Base Cost Weight	Area of Study Bonus	Total
01	Agriculture	0.20	0.29	0.00	0.49
02	Agricultural Sciences (Legacy)	0.20	0.29	0.00	0.49
03	Natural Resources, Conservation	0.20	0.05	0.00	0.25
04	Architecture	0.20	0.14	0.00	0.34
05	Area, Ethnic, Cultural, Gender, Group Studies	0.20	0.05	0.00	0.25
09	Communication, Journalism	0.20	0.14	0.00	0.34
10	Communications Technologies	0.20	0.14	0.00	0.34
11	Computer and Information Science	0.20	0.29	0.10	0.59
13	Education	0.20	0.05	0.00	0.25
14	Engineering	0.20	0.29	0.10	0.59
15	Engineering Technologies	0.20	0.29	0.10	0.59
16	Foreign Languages, Literatures, Linguistics	0.20	0.14	0.00	0.34
19	Family and Consumer Sciences	0.20	0.14	0.00	0.34
22	Legal Professions and Studies	0.20	0.05	0.00	0.25
23	English Language and Literature	0.20	0.14	0.00	0.34
24	Liberal Arts and Sciences, Humanities	0.20	0.05	0.00	0.25
25	Library Science	0.20	0.05	0.00	0.25
26	Biological and Biomedical Sciences	0.20	0.29	0.10	0.59
27	Mathematics and Statistics	0.20	0.29	0.10	0.59
28	Military Science, Leadership, Operational Art	0.20	0.05	0.00	0.25
29	Military Technologies	0.20	0.05	0.00	0.25
30	Multi/Interdisciplinary Studies	0.20	0.14	0.00	0.34
30.01	Multi/Interdisciplinary Studies	0.20	0.14	0.07	0.41
30.06	Multi/Interdisciplinary Studies	0.20	0.14	0.07	0.41
30.08	Multi/Interdisciplinary Studies	0.20	0.14	0.07	0.41
30.18	Multi/Interdisciplinary Studies	0.20	0.14	0.07	0.41
31	Parks, Rec, Leisure, Fitness Studies	0.20	0.14	0.00	0.34
32	Basic Skills, Developmental/Remedial Education	0.20	0.05	0.00	0.25
34	Health Related Knowledge and Skills	0.20	-0.20	0.00	0.00
38	Philosophy and Religious Studies	0.20	0.05	0.00	0.25
40	Physical Sciences	0.20	0.29	0.10	0.59
41	Science Technologies	0.20	0.29	0.00	0.49
42	Psychology	0.20	0.05	0.00	0.25
43	Homeland Security, Law Enforce, Protective Services	0.20	0.05	0.00	0.25
44	Public Administration and Social Services	0.20	0.05	0.00	0.25
45	Social Sciences and History	0.20	0.05	0.00	0.25
50	Visual and Performing Arts	0.20	0.14	0.00	0.34
51	Health Professions, Related Programs	0.20	0.14	0.07	0.41
51.20	Pharmacy	0.20	0.29	0.00	0.49
51.24	Veterinary Medicine	0.20	0.29	0.00	0.49
52	Business, Mgmt, Marketing, Related Support Svcs	0.20	0.05	0.00	0.25
54	History	0.20	0.05	0.00	0.25
9999	Unknown	0.20	0.05	0.00	0.25
BLE	Bilingual Education	0.20	0.05	0.30	0.56

SSCM DATA

Student Credit Hour Completions (3-year average) by Institution

EOU SSCM Credit Hour Completion data: Average 2012-13, 2013-14, 2014-15						
CIP Code	CIP Description	Resident			Resident & Non-Resident PhD	Total Credit Hour Completions
		Freshman Sophomore	Junior Senior	Masters Grad. Cert. First Professional		
01	Agriculture	0.00	0.00	0.00	0.00	0.00
02	Agricultural Sciences (Legacy)	0.00	0.00	0.00	0.00	0.00
03	Natural Resources, Conservation	15.00	4.67	0.00	0.00	19.67
04	Architecture	0.00	0.00	0.00	0.00	0.00
05	Area, Ethnic, Cultural, Gender, Group Studies	23.00	137.33	0.00	0.00	160.33
09	Communication, Journalism	1,241.00	1,878.67	5.33	0.00	3,125.00
10	Communications Technologies	0.00	0.00	0.00	0.00	0.00
11	Computer and Information Science	475.33	646.67	5.33	0.00	1,127.33
13	Education	484.33	4,611.00	4,306.67	0.00	9,402.00
14	Engineering	0.00	0.00	0.00	0.00	0.00
15	Engineering Technologies	0.00	0.00	0.00	0.00	0.00
16	Foreign Languages, Literatures, Linguistics	925.00	832.33	22.67	0.00	1,780.00
19	Family and Consumer Sciences	0.00	0.00	0.00	0.00	0.00
22	Legal Professions and Studies	0.00	0.00	0.00	0.00	0.00
23	English Language and Literature	3,146.00	2,347.33	180.33	0.00	5,673.67
24	Liberal Arts and Sciences, Humanities	450.67	369.67	0.00	0.00	820.33
25	Library Science	471.33	492.00	3.00	0.00	966.33
26	Biological and Biomedical Sciences	1,621.67	1,667.00	42.33	0.00	3,331.00
27	Mathematics and Statistics	3,383.33	2,379.00	163.00	0.00	5,925.33
28	Military Science, Leadership, Operational Art	51.00	60.67	2.00	0.00	113.67
29	Military Technologies	0.00	0.00	0.00	0.00	0.00
30	Multi/Interdisciplinary Studies	380.00	381.00	7.33	0.00	768.33
30.01	Biological and Physical Sciences	0.00	0.00	0.00	0.00	0.00
30.06	Systems Science and Theory	0.00	0.00	0.00	0.00	0.00
30.08	Mathematics and Computer Science	0.00	0.00	0.00	0.00	0.00
30.18	Natural Sciences	0.00	0.00	0.00	0.00	0.00
31	Parks, Rec, Leisure, Fitness Studies	1,809.33	3,926.67	131.00	0.00	5,867.00
32	Basic Skills, Developmental/Remedial Education	0.00	0.00	0.00	0.00	0.00
34	Health Related Knowledge and Skills	0.00	0.00	0.00	0.00	0.00
38	Philosophy and Religious Studies	383.67	833.00	5.00	0.00	1,221.67
40	Physical Sciences	1,315.00	1,411.33	23.00	0.00	2,749.33
41	Science Technologies	0.00	0.00	0.00	0.00	0.00
42	Psychology	1,490.00	3,110.67	21.67	0.00	4,622.33
43	Homeland Security, Law Enforce, Protective Services	96.67	608.00	10.00	0.00	714.67
44	Public Administration and Social Services	640.00	598.00	5.50	0.00	1,243.50
45	Social Sciences and History	3,161.00	9,549.67	20.00	0.00	12,730.67
50	Visual and Performing Arts	2,695.00	3,561.67	42.00	0.00	6,298.67
51	Health Professions, Related Programs	0.00	0.00	0.00	0.00	0.00
51.20	Pharmacy	0.00	0.00	0.00	0.00	0.00
51.24	Veterinary Medicine	0.00	0.00	0.00	0.00	0.00
52	Business, Mgmt, Marketing, Related Support Svcs	2,497.00	14,335.00	1,324.00	0.00	18,156.00
54	History	0.00	0.00	0.00	0.00	0.00
9999	Unknown	0.00	0.00	0.00	0.00	0.00
Total:		26,755.33	53,741.33	6,320.17	0.00	86,816.83

OIT SSCM Credit Hour Completion data: Average 2012-13, 2013-14, 2014-15

CIP Code	CIP Description	Resident			Resident & Non-Resident PhD	Total Credit Hour Completions
		Freshman Sophomore	Junior Senior	Masters Grad. Cert. First Professional		
01	Agriculture	0.00	0.00	0.00	0.00	0.00
02	Agricultural Sciences (Legacy)	0.00	0.00	0.00	0.00	0.00
03	Natural Resources, Conservation	0.00	0.00	0.00	0.00	0.00
04	Architecture	0.00	0.00	0.00	0.00	0.00
05	Area, Ethnic, Cultural, Gender, Group Studies	0.00	0.00	0.00	0.00	0.00
09	Communication, Journalism	1,509.00	2,520.00	0.00	0.00	4,029.00
10	Communications Technologies	0.00	0.00	0.00	0.00	0.00
11	Computer and Information Science	0.00	0.00	0.00	0.00	0.00
13	Education	0.00	0.00	0.00	0.00	0.00
14	Engineering	910.33	7,579.67	226.00	0.00	8,716.00
15	Engineering Technologies	3,029.00	6,738.33	144.67	0.00	9,912.00
16	Foreign Languages, Literatures, Linguistics	93.00	235.33	0.00	0.00	328.33
19	Family and Consumer Sciences	0.00	0.00	0.00	0.00	0.00
22	Legal Professions and Studies	0.00	0.00	0.00	0.00	0.00
23	English Language and Literature	2,454.00	1,965.00	8.00	0.00	4,427.00
24	Liberal Arts and Sciences, Humanities	1,142.33	1,164.33	1.00	0.00	2,307.67
25	Library Science	0.00	2.00	0.00	0.00	2.00
26	Biological and Biomedical Sciences	3,177.33	2,670.33	1.33	0.00	5,849.00
27	Mathematics and Statistics	4,722.67	4,216.00	10.67	0.00	8,949.33
28	Military Science, Leadership, Operational Art	0.00	0.00	0.00	0.00	0.00
29	Military Technologies	0.00	0.00	0.00	0.00	0.00
30	Multi/Interdisciplinary Studies	0.00	5.33	0.00	0.00	5.33
30.01	Biological and Physical Sciences	0.00	0.00	0.00	0.00	0.00
30.06	Systems Science and Theory	0.00	0.00	0.00	0.00	0.00
30.08	Mathematics and Computer Science	0.00	0.00	0.00	0.00	0.00
30.18	Natural Sciences	0.00	0.00	0.00	0.00	0.00
31	Parks, Rec, Leisure, Fitness Studies	436.00	452.00	0.67	0.00	888.67
32	Basic Skills, Developmental/Remedial Education	0.00	0.00	0.00	0.00	0.00
34	Health Related Knowledge and Skills	0.00	0.00	0.00	0.00	0.00
38	Philosophy and Religious Studies	0.00	0.00	0.00	0.00	0.00
40	Physical Sciences	2,587.00	3,429.33	0.00	0.00	6,016.33
41	Science Technologies	96.00	310.00	2.67	0.00	408.67
42	Psychology	1,904.33	3,481.00	2.00	0.00	5,387.33
43	Homeland Security, Law Enforce, Protective Services	0.00	0.00	0.00	0.00	0.00
44	Public Administration and Social Services	0.00	0.00	0.00	0.00	0.00
45	Social Sciences and History	1,750.33	1,790.00	5.00	0.00	3,545.33
50	Visual and Performing Arts	320.00	409.67	0.00	0.00	729.67
51	Health Professions, Related Programs	2,706.33	22,564.33	0.00	0.00	25,270.67
51.20	Pharmacy	0.00	0.00	0.00	0.00	0.00
51.24	Veterinary Medicine	0.00	0.00	0.00	0.00	0.00
52	Business, Mgmt, Marketing, Related Support Svcs	1,323.67	8,389.33	5.00	0.00	9,718.00
54	History	0.00	0.00	0.00	0.00	0.00
9999	Unknown	0.00	0.00	0.00	0.00	0.00
Total:		28,161.33	67,922.00	407.00	0.00	96,490.33

OSU-Corvallis SSCM Credit Hour Completion data: Average 2012-13, 2013-14, 2014-15

CIP Code	CIP Description	Resident			Resident & Non-Resident PhD	Total Credit Hour Completions
		Freshman Sophomore	Junior Senior	Masters Grad. Cert. First Professional		
01	Agriculture	5,831.67	19,508.00	1,556.33	2,456.33	29,352.33
02	Agricultural Sciences (Legacy)	0.00	0.00	0.00	0.00	0.00
03	Natural Resources, Conservation	2,073.33	12,380.00	2,395.67	4,531.67	21,380.67
04	Architecture	0.00	0.00	0.00	0.00	0.00
05	Area, Ethnic, Cultural, Gender, Group Studies	3,421.67	8,465.33	500.67	84.67	12,472.33
09	Communication, Journalism	10,192.00	9,460.00	372.67	25.00	20,049.67
10	Communications Technologies	0.00	0.00	0.00	0.00	0.00
11	Computer and Information Science	4,567.00	14,121.00	523.33	3,066.67	22,278.00
13	Education	1,801.67	4,121.67	3,645.33	3,560.00	13,128.67
14	Engineering	11,050.33	45,567.33	4,417.00	10,535.00	71,569.67
15	Engineering Technologies	0.00	0.00	0.00	0.00	0.00
16	Foreign Languages, Literatures, Linguistics	5,830.33	8,958.67	235.67	107.67	15,132.33
19	Family and Consumer Sciences	7,842.67	22,884.33	513.67	1,597.00	32,837.67
22	Legal Professions and Studies	0.00	0.00	0.00	0.00	0.00
23	English Language and Literature	16,579.33	11,072.00	524.33	46.67	28,222.33
24	Liberal Arts and Sciences, Humanities	1,994.00	361.33	59.67	208.00	2,623.00
25	Library Science	0.00	0.00	0.00	0.00	0.00
26	Biological and Biomedical Sciences	16,892.00	36,312.67	1,347.33	8,046.67	62,598.67
27	Mathematics and Statistics	36,664.33	22,156.67	1,325.33	3,528.33	63,674.67
28	Military Science, Leadership, Operational Art	585.33	867.00	6.67	3.00	1,462.00
29	Military Technologies	0.00	0.00	0.00	0.00	0.00
30	Multi/Interdisciplinary Studies	718.00	1,564.33	202.33	30.33	2,515.00
30.01	Biological and Physical Sciences	0.00	0.00	0.00	0.00	0.00
30.06	Systems Science and Theory	0.00	0.00	0.00	0.00	0.00
30.08	Mathematics and Computer Science	0.00	0.00	0.00	0.00	0.00
30.18	Natural Sciences	0.00	0.00	0.00	0.00	0.00
31	Parks, Rec, Leisure, Fitness Studies	12,454.67	18,907.00	806.67	938.67	33,107.00
32	Basic Skills, Developmental/Remedial Education	0.00	0.00	0.00	0.00	0.00
34	Health Related Knowledge and Skills	0.00	0.00	0.00	0.00	0.00
38	Philosophy and Religious Studies	2,997.00	5,270.00	147.67	27.00	8,441.67
40	Physical Sciences	39,211.00	34,039.33	961.67	10,385.33	84,597.33
41	Science Technologies	0.00	0.00	0.00	0.00	0.00
42	Psychology	6,789.33	12,637.67	278.33	57.33	19,762.67
43	Homeland Security, Law Enforce, Protective Services	0.00	0.00	0.00	0.00	0.00
44	Public Administration and Social Services	13.33	157.33	194.33	183.33	548.33
45	Social Sciences and History	24,308.00	38,661.67	2,264.00	1,820.67	67,054.33
50	Visual and Performing Arts	10,476.33	13,202.33	107.33	48.33	23,834.33
51	Health Professions, Related Programs	4,014.33	16,497.00	2,504.33	2,104.67	25,120.33
51.20	Pharmacy	403.00	486.67	13,991.67	1,117.00	15,998.33
51.24	Veterinary Medicine	0.00	0.33	8,809.33	2.67	8,812.33
52	Business, Mgmt, Marketing, Related Support Svcs	8,789.00	36,778.00	2,119.33	151.33	47,837.67
54	History	0.00	0.00	0.00	0.00	0.00
9999	Unknown	0.00	0.00	0.00	0.00	0.00
Total:		235,499.67	394,437.67	49,810.67	54,663.33	734,411.33

OSU-Cascades SSCM Credit Hour Completion data: Average 2012-13, 2013-14, 2014-15

CIP Code	CIP Description	Resident			Resident & Non-Resident PhD	Total Credit Hour Completions
		Freshman Sophomore	Junior Senior	Masters Grad. Cert. First Professional		
01	Agriculture	6.33	249.67	12.33	0.00	268.33
02	Agricultural Sciences (Legacy)	0.00	0.00	0.00	0.00	0.00
03	Natural Resources, Conservation	56.67	1,288.00	0.00	0.00	1,344.67
04	Architecture	0.00	0.00	0.00	0.00	0.00
05	Area, Ethnic, Cultural, Gender, Group Studies	14.67	160.33	1.33	0.00	176.33
09	Communication, Journalism	15.33	494.00	1.00	0.00	510.33
10	Communications Technologies	0.00	0.00	0.00	0.00	0.00
11	Computer and Information Science	12.33	142.67	0.00	0.00	155.00
13	Education	31.67	135.67	4,528.67	0.00	4,696.00
14	Engineering	2.67	827.33	0.00	0.00	830.00
15	Engineering Technologies	0.00	0.00	0.00	0.00	0.00
16	Foreign Languages, Literatures, Linguistics	13.00	18.00	7.00	0.00	38.00
19	Family and Consumer Sciences	175.33	3,269.00	22.67	0.00	3,467.00
22	Legal Professions and Studies	0.00	0.00	0.00	0.00	0.00
23	English Language and Literature	35.00	430.67	197.33	0.00	663.00
24	Liberal Arts and Sciences, Humanities	28.00	93.33	0.00	0.00	121.33
25	Library Science	0.00	0.00	0.00	0.00	0.00
26	Biological and Biomedical Sciences	97.67	930.33	15.67	0.00	1,043.67
27	Mathematics and Statistics	38.67	470.00	12.00	0.00	520.67
28	Military Science, Leadership, Operational Art	4.00	47.33	6.00	0.00	57.33
29	Military Technologies	0.00	0.00	0.00	0.00	0.00
30	Multi/Interdisciplinary Studies	2.67	155.00	0.00	0.00	157.67
30.01	Biological and Physical Sciences	0.00	0.00	0.00	0.00	0.00
30.06	Systems Science and Theory	0.00	0.00	0.00	0.00	0.00
30.08	Mathematics and Computer Science	0.00	0.00	0.00	0.00	0.00
30.18	Natural Sciences	0.00	0.00	0.00	0.00	0.00
31	Parks, Rec, Leisure, Fitness Studies	51.00	1,468.00	0.00	0.00	1,519.00
32	Basic Skills, Developmental/Remedial Education	0.00	0.00	0.00	0.00	0.00
34	Health Related Knowledge and Skills	0.00	0.00	0.00	0.00	0.00
38	Philosophy and Religious Studies	0.00	0.00	0.00	0.00	0.00
40	Physical Sciences	64.33	667.00	6.33	0.00	737.67
41	Science Technologies	0.00	0.00	0.00	0.00	0.00
42	Psychology	52.00	855.00	2.67	0.00	909.67
43	Homeland Security, Law Enforce, Protective Services	0.00	0.00	0.00	0.00	0.00
44	Public Administration and Social Services	0.00	0.00	0.00	0.00	0.00
45	Social Sciences and History	35.00	1,084.33	7.67	0.00	1,127.00
50	Visual and Performing Arts	6.33	485.00	14.33	0.00	505.67
51	Health Professions, Related Programs	0.00	0.00	5.00	0.00	5.00
51.20	Pharmacy	0.00	0.00	0.00	0.00	0.00
51.24	Veterinary Medicine	0.00	0.00	0.00	0.00	0.00
52	Business, Mgmt, Marketing, Related Support Svcs	18.67	2,729.33	1.33	0.00	2,749.33
54	History	0.00	0.00	0.00	0.00	0.00
9999	Unknown	0.00	0.00	0.00	0.00	0.00
Total:		761.33	16,000.00	4,841.33	0.00	21,602.67

PSU SSCM Credit Hour Completion data: Average 2012-13, 2013-14, 2014-15						
CIP Code	CIP Description	Resident			Resident & Non-Resident PhD	Total Credit Hour Completions
		Freshman Sophomore	Junior Senior	Masters Grad. Cert. First Professional		
01	Agriculture	0.00	0.00	0.00	0.00	0.00
02	Agricultural Sciences (Legacy)	0.00	0.00	0.00	0.00	0.00
03	Natural Resources, Conservation	534.00	4,007.67	579.33	622.67	5,743.67
04	Architecture	1,263.67	3,443.33	932.00	3.00	5,642.00
05	Area, Ethnic, Cultural, Gender, Group Studies	2,145.33	11,967.00	211.67	9.67	14,333.67
09	Communication, Journalism	2,859.00	11,641.67	324.67	4.67	14,830.00
10	Communications Technologies	0.00	0.00	0.00	0.00	0.00
11	Computer and Information Science	3,003.00	10,228.67	1,094.67	863.67	15,190.00
13	Education	4,818.33	7,181.67	37,936.33	1,464.67	51,401.00
14	Engineering	2,107.00	18,585.33	3,433.33	1,508.67	25,634.33
15	Engineering Technologies	8.00	24.33	850.67	915.00	1,798.00
16	Foreign Languages, Literatures, Linguistics	13,375.33	24,933.33	2,590.67	303.00	41,202.33
19	Family and Consumer Sciences	290.00	6,716.00	27.00	0.00	7,033.00
22	Legal Professions and Studies	0.00	0.00	0.00	0.00	0.00
23	English Language and Literature	5,700.00	20,151.33	2,613.67	10.33	28,475.33
24	Liberal Arts and Sciences, Humanities	152.33	577.67	586.00	1.33	1,317.33
25	Library Science	0.00	0.00	0.00	0.00	0.00
26	Biological and Biomedical Sciences	5,364.00	21,759.33	1,200.00	654.67	28,978.00
27	Mathematics and Statistics	11,257.00	21,165.67	2,558.33	663.00	35,644.00
28	Military Science, Leadership, Operational Art	46.00	130.33	10.67	0.00	187.00
29	Military Technologies	0.00	0.00	0.00	0.00	0.00
30	Multi/Interdisciplinary Studies	30,358.00	34,411.67	2,328.00	386.00	67,483.67
30.01	Biological and Physical Sciences	0.00	0.00	0.00	0.00	0.00
30.06	Systems Science and Theory	0.00	0.00	0.00	0.00	0.00
30.08	Mathematics and Computer Science	0.00	0.00	0.00	0.00	0.00
30.18	Natural Sciences	0.00	0.00	0.00	0.00	0.00
31	Parks, Rec, Leisure, Fitness Studies	0.00	0.00	0.00	0.00	0.00
32	Basic Skills, Developmental/Remedial Education	0.00	0.00	0.00	0.00	0.00
34	Health Related Knowledge and Skills	0.00	0.00	0.00	0.00	0.00
38	Philosophy and Religious Studies	3,114.00	12,969.67	101.67	12.00	16,197.33
40	Physical Sciences	10,794.33	29,707.00	1,460.00	1,810.00	43,771.33
41	Science Technologies	0.00	0.00	0.00	0.00	0.00
42	Psychology	5,957.33	24,482.67	499.67	1,139.33	32,079.00
43	Homeland Security, Law Enforce, Protective Services	2,948.67	14,221.67	344.00	33.00	17,547.33
44	Public Administration and Social Services	338.00	4,951.33	17,240.00	1,521.67	24,051.00
45	Social Sciences and History	16,733.33	62,890.33	5,671.33	1,829.00	87,124.00
50	Visual and Performing Arts	12,229.67	34,497.00	1,924.33	3.33	48,654.33
51	Health Professions, Related Programs	3,363.00	27,256.67	5,797.00	91.33	36,508.00
51.20	Pharmacy	0.00	0.00	0.00	0.00	0.00
51.24	Veterinary Medicine	0.00	0.00	0.00	0.00	0.00
52	Business, Mgmt, Marketing, Related Support Svcs	5,944.00	56,810.33	6,717.33	32.33	69,504.00
54	History	0.00	0.00	0.00	0.00	0.00
9999	Unknown	0.00	0.00	0.00	0.00	0.00
Total:		144,703.33	464,711.67	97,032.33	13,882.33	720,329.67

SOU SSCM Credit Hour Completion data: Average 2012-13, 2013-14, 2014-15						
CIP Code	CIP Description	Resident			Resident & Non-Resident PhD	Total Credit Hour Completions
		Freshman Sophomore	Junior Senior	Masters Grad. Cert. First Professional		
01	Agriculture	0.00	0.00	0.00	0.00	0.00
02	Agricultural Sciences (Legacy)	0.00	0.00	0.00	0.00	0.00
03	Natural Resources, Conservation	48.33	302.00	11.67	0.00	362.00
04	Architecture	0.00	0.00	0.00	0.00	0.00
05	Area, Ethnic, Cultural, Gender, Group Studies	258.00	641.00	16.33	0.00	915.33
09	Communication, Journalism	1,901.00	3,510.00	54.33	0.00	5,465.33
10	Communications Technologies	0.00	0.00	0.00	0.00	0.00
11	Computer and Information Science	388.67	2,607.67	65.00	0.00	3,061.33
13	Education	668.00	5,073.33	7,530.33	0.00	13,271.67
14	Engineering	64.33	307.33	0.00	0.00	371.67
15	Engineering Technologies	0.00	0.00	0.00	0.00	0.00
16	Foreign Languages, Literatures, Linguistics	3,457.33	2,520.00	69.00	0.00	6,046.33
19	Family and Consumer Sciences	0.00	0.00	0.00	0.00	0.00
22	Legal Professions and Studies	0.00	0.00	0.00	0.00	0.00
23	English Language and Literature	1,184.00	2,397.00	185.00	0.00	3,766.00
24	Liberal Arts and Sciences, Humanities	489.00	295.00	81.33	0.00	865.33
25	Library Science	0.00	0.00	0.00	0.00	0.00
26	Biological and Biomedical Sciences	2,249.67	2,786.00	157.33	0.00	5,193.00
27	Mathematics and Statistics	3,223.00	3,175.00	149.67	0.00	6,547.67
28	Military Science, Leadership, Operational Art	79.33	125.67	11.00	0.00	216.00
29	Military Technologies	0.00	0.00	0.00	0.00	0.00
30	Multi/Interdisciplinary Studies	5,451.00	2,929.00	376.00	0.00	8,756.00
30.01	Biological and Physical Sciences	0.00	0.00	0.00	0.00	0.00
30.06	Systems Science and Theory	0.00	0.00	0.00	0.00	0.00
30.08	Mathematics and Computer Science	0.00	0.00	0.00	0.00	0.00
30.18	Natural Sciences	0.00	0.00	0.00	0.00	0.00
31	Parks, Rec, Leisure, Fitness Studies	2,307.67	4,213.67	78.67	0.00	6,600.00
32	Basic Skills, Developmental/Remedial Education	0.00	0.00	16.00	0.00	16.00
34	Health Related Knowledge and Skills	0.00	0.00	0.00	0.00	0.00
38	Philosophy and Religious Studies	832.33	1,196.33	63.67	0.00	2,092.33
40	Physical Sciences	1,844.33	3,548.33	25.67	0.00	5,418.33
41	Science Technologies	65.00	355.67	0.00	0.00	420.67
42	Psychology	2,317.00	6,500.00	96.00	0.00	8,913.00
43	Homeland Security, Law Enforce, Protective Services	1,825.67	3,849.67	7.00	0.00	5,682.33
44	Public Administration and Social Services	21.67	275.67	1.67	0.00	299.00
45	Social Sciences and History	3,650.67	6,450.33	328.00	0.00	10,429.00
50	Visual and Performing Arts	4,620.00	7,019.33	244.33	0.00	11,883.67
51	Health Professions, Related Programs	29.33	300.00	1,090.00	0.00	1,419.33
51.20	Pharmacy	0.00	0.00	0.00	0.00	0.00
51.24	Veterinary Medicine	0.00	0.00	0.00	0.00	0.00
52	Business, Mgmt, Marketing, Related Support Svcs	1,915.00	11,328.33	1,455.33	0.00	14,698.67
54	History	0.00	0.00	0.00	0.00	0.00
9999	Unknown	0.00	0.00	0.00	0.00	0.00
Total:		38,890.33	71,706.33	12,113.33	0.00	122,710.00

UO SSCM Credit Hour Completion data: Average 2012-13, 2013-14, 2014-15

CIP Code	CIP Description	Resident			Resident & Non-Resident PhD	Total Credit Hour Completions
		Freshman Sophomore	Junior Senior	Masters Grad. Cert. First Professional		
01	Agriculture	0.00	0.00	0.00	0.00	0.00
02	Agricultural Sciences (Legacy)	0.00	0.00	0.00	0.00	0.00
03	Natural Resources, Conservation	1,635.67	2,873.33	94.00	152.00	4,755.00
04	Architecture	1,716.67	6,389.67	2,300.33	274.00	10,680.67
05	Area, Ethnic, Cultural, Gender, Group Studies	3,721.00	10,656.67	264.33	183.00	14,825.00
09	Communication, Journalism	6,579.33	19,905.33	1,178.33	798.67	28,461.67
10	Communications Technologies	0.00	0.00	0.00	0.00	0.00
11	Computer and Information Science	2,923.00	6,025.67	256.67	1,120.67	10,326.00
13	Education	4,765.33	9,194.00	9,972.33	4,200.00	28,131.67
14	Engineering	0.00	0.00	0.00	0.00	0.00
15	Engineering Technologies	0.00	0.00	0.00	0.00	0.00
16	Foreign Languages, Literatures, Linguistics	22,894.67	28,920.33	1,325.67	3,809.00	56,949.67
19	Family and Consumer Sciences	0.00	0.00	0.00	0.00	0.00
22	Legal Professions and Studies	470.67	386.00	6,951.33	6.50	7,814.50
23	English Language and Literature	16,058.00	11,298.00	295.33	3,028.33	30,679.67
24	Liberal Arts and Sciences, Humanities	1,139.67	762.33	3.33	1.33	1,906.67
25	Library Science	51.67	5.33	6.33	40.33	103.67
26	Biological and Biomedical Sciences	4,989.00	18,546.33	583.00	4,975.00	29,093.33
27	Mathematics and Statistics	17,072.67	13,523.33	88.00	2,471.67	33,155.67
28	Military Science, Leadership, Operational Art	580.33	653.33	0.00	0.00	1,233.67
29	Military Technologies	0.00	0.00	0.00	0.00	0.00
30	Multi/Interdisciplinary Studies	5,686.00	6,732.00	1,389.67	92.67	13,900.33
30.01	Biological and Physical Sciences	0.00	0.00	0.00	0.00	0.00
30.06	Systems Science and Theory	0.00	0.00	0.00	0.00	0.00
30.08	Mathematics and Computer Science	0.00	0.00	0.00	0.00	0.00
30.18	Natural Sciences	0.00	0.00	0.00	0.00	0.00
31	Parks, Rec, Leisure, Fitness Studies	649.33	2,631.67	16.33	16.33	3,313.67
32	Basic Skills, Developmental/Remedial Education	6.67	0.00	3.00	40.33	50.00
34	Health Related Knowledge and Skills	0.00	0.00	0.00	0.00	0.00
38	Philosophy and Religious Studies	4,911.33	5,706.67	185.33	896.00	11,699.33
40	Physical Sciences	17,331.67	22,317.67	1,252.33	10,008.67	50,910.33
41	Science Technologies	0.00	0.00	0.00	0.00	0.00
42	Psychology	7,218.33	16,563.00	842.00	5,438.00	30,061.33
43	Homeland Security, Law Enforce, Protective Services	0.00	0.00	0.00	0.00	0.00
44	Public Administration and Social Services	3,402.33	11,092.00	1,501.00	106.67	16,102.00
45	Social Sciences and History	28,146.67	51,072.67	895.67	7,405.33	87,520.33
50	Visual and Performing Arts	15,562.00	28,809.00	2,018.33	1,688.33	48,077.67
51	Health Professions, Related Programs	685.67	5,145.33	2,677.00	172.33	8,680.33
51.20	Pharmacy	0.00	0.00	0.00	0.00	0.00
51.24	Veterinary Medicine	0.00	0.00	0.00	0.00	0.00
52	Business, Mgmt, Marketing, Related Support Svcs	10,152.67	31,238.33	4,112.33	796.67	46,300.00
54	History	0.00	0.00	0.00	0.00	0.00
9999	Unknown	0.00	0.00	0.00	0.00	0.00
Total:		178,350.33	310,448.00	38,212.00	47,721.83	574,732.17

WOU SSCM Credit Hour Completion data: Average 2012-13, 2013-14, 2014-15

CIP Code	CIP Description	Resident			Resident & Non-Resident PhD	Total Credit Hour Completions
		Freshman Sophomore	Junior Senior	Masters Grad. Cert. First Professional		
01	Agriculture	0.00	0.00	0.00	0.00	0.00
02	Agricultural Sciences (Legacy)	0.00	0.00	0.00	0.00	0.00
03	Natural Resources, Conservation	0.00	0.00	0.00	0.00	0.00
04	Architecture	0.00	0.00	0.00	0.00	0.00
05	Area, Ethnic, Cultural, Gender, Group Studies	0.00	0.00	0.00	0.00	0.00
09	Communication, Journalism	2,241.00	3,292.67	0.00	0.00	5,533.67
10	Communications Technologies	0.00	0.00	0.00	0.00	0.00
11	Computer and Information Science	1,439.33	3,775.67	252.33	0.00	5,467.33
13	Education	1,359.00	7,010.67	10,799.67	0.00	19,169.33
14	Engineering	0.00	0.00	0.00	0.00	0.00
15	Engineering Technologies	0.00	10.67	0.00	0.00	10.67
16	Foreign Languages, Literatures, Linguistics	3,634.00	6,100.33	98.00	0.00	9,832.33
19	Family and Consumer Sciences	0.00	0.00	0.00	0.00	0.00
22	Legal Professions and Studies	0.00	0.00	0.00	0.00	0.00
23	English Language and Literature	7,373.00	4,313.33	45.67	0.00	11,732.00
24	Liberal Arts and Sciences, Humanities	0.00	35.67	2.67	0.00	38.33
25	Library Science	4.00	17.00	143.00	0.00	164.00
26	Biological and Biomedical Sciences	5,650.67	4,371.33	17.33	0.00	10,039.33
27	Mathematics and Statistics	5,340.67	4,294.33	83.33	0.00	9,718.33
28	Military Science, Leadership, Operational Art	44.00	76.67	0.00	0.00	120.67
29	Military Technologies	0.00	0.00	0.00	0.00	0.00
30	Multi/Interdisciplinary Studies	1,411.33	828.00	4.33	0.00	2,243.67
30.01	Biological and Physical Sciences	0.00	0.00	0.00	0.00	0.00
30.06	Systems Science and Theory	0.00	0.00	0.00	0.00	0.00
30.08	Mathematics and Computer Science	0.00	0.00	0.00	0.00	0.00
30.18	Natural Sciences	0.00	0.00	0.00	0.00	0.00
31	Parks, Rec, Leisure, Fitness Studies	3,540.33	5,231.33	26.00	0.00	8,797.67
32	Basic Skills, Developmental/Remedial Education	0.00	0.00	0.00	0.00	0.00
34	Health Related Knowledge and Skills	0.00	0.00	0.00	0.00	0.00
38	Philosophy and Religious Studies	1,929.67	1,205.67	2.00	0.00	3,137.33
40	Physical Sciences	4,767.00	3,828.33	18.00	0.00	8,613.33
41	Science Technologies	0.00	0.00	0.00	0.00	0.00
42	Psychology	3,855.00	9,386.00	66.00	0.00	13,307.00
43	Homeland Security, Law Enforce, Protective Services	2,086.67	7,171.67	640.00	0.00	9,898.33
44	Public Administration and Social Services	0.00	0.00	0.00	0.00	0.00
45	Social Sciences and History	6,689.67	11,991.33	206.67	0.00	18,887.67
50	Visual and Performing Arts	7,319.00	8,251.33	279.33	0.00	15,849.67
51	Health Professions, Related Programs	1,999.00	6,543.67	810.33	0.00	9,353.00
51.20	Pharmacy	0.00	0.00	0.00	0.00	0.00
51.24	Veterinary Medicine	0.00	0.00	0.00	0.00	0.00
52	Business, Mgmt, Marketing, Related Support Svcs	2,096.00	8,009.67	189.00	0.00	10,294.67
54	History	0.00	0.00	0.00	0.00	0.00
9999	Unknown	0.00	0.00	0.00	0.00	0.00
Total:		62,779.33	95,745.33	13,683.67	0.00	172,208.33

Resident Degree Completions (3-year average) by Institution

EOU SSCM Degree Completion data: Average 2012-13, 2013-14, 2014-15									
CIP Code	CIP Description	Resident Degree Completions						Non-Resident	Total Degree Completions
		Non-Transfer BA/BS	Transfer BA/BS	Masters	PhD	First Professional	Graduate Certificates	PhD	
01	Agriculture	-	-	-	-	-	-	-	-
02	Agricultural Sciences (Legacy)	-	-	-	-	-	-	-	-
03	Natural Resources, Conservation	-	-	-	-	-	-	-	-
04	Architecture	-	-	-	-	-	-	-	-
05	Area, Ethnic, Cultural, Gender, Group Studies	-	-	-	-	-	-	-	-
09	Communication, Journalism	5.00	0.67	-	-	-	-	-	5.67
10	Communications Technologies	-	-	-	-	-	-	-	-
11	Computer and Information Science	3.33	1.00	-	-	-	-	-	4.33
13	Education	24.00	31.00	47.00	-	-	72.67	-	174.67
14	Engineering	-	-	-	-	-	-	-	-
15	Engineering Technologies	-	-	-	-	-	-	-	-
16	Foreign Languages, Literatures, Linguistics	-	-	-	-	-	-	-	-
19	Family and Consumer Sciences	-	-	-	-	-	-	-	-
22	Legal Professions and Studies	-	-	-	-	-	-	-	-
23	English Language and Literature	6.00	3.00	-	-	-	-	-	9.00
24	Liberal Arts and Sciences, Humanities	42.33	61.33	-	-	-	-	-	103.67
25	Library Science	-	-	-	-	-	-	-	-
26	Biological and Biomedical Sciences	11.00	3.33	-	-	-	-	-	14.33
27	Mathematics and Statistics	6.00	1.00	-	-	-	-	-	7.00
28	Military Science, Leadership, Operational Art	-	-	-	-	-	-	-	-
29	Military Technologies	-	-	-	-	-	-	-	-
30	Multi/Interdisciplinary Studies	-	-	-	-	-	-	-	-
30.01	Biological and Physical Sciences	-	-	-	-	-	-	-	-
30.06	Systems Science and Theory	-	-	-	-	-	-	-	-
30.08	Mathematics and Computer Science	-	-	-	-	-	-	-	-
30.18	Natural Sciences	-	-	-	-	-	-	-	-
31	Parks, Rec, Leisure, Fitness Studies	9.00	6.33	-	-	-	-	-	15.33
32	Basic Skills, Developmental/Remedial Education	-	-	-	-	-	-	-	-
34	Health Related Knowledge and Skills	-	-	-	-	-	-	-	-
38	Philosophy and Religious Studies	1.67	2.00	-	-	-	-	-	3.67
40	Physical Sciences	1.00	0.50	-	-	-	-	-	1.50
41	Science Technologies	-	-	-	-	-	-	-	-
42	Psychology	10.00	7.67	-	-	-	-	-	17.67
43	Homeland Security, Law Enforce, Protective Services	3.33	12.67	-	-	-	-	-	16.00
44	Public Administration and Social Services	0.33	0.33	-	-	-	-	-	0.67
45	Social Sciences and History	14.67	14.67	-	-	-	-	-	29.33
50	Visual and Performing Arts	15.67	3.00	-	-	-	-	-	18.67
51	Health Professions, Related Programs	-	-	-	-	-	-	-	-
51.20	Pharmacy	-	-	-	-	-	-	-	-
51.24	Veterinary Medicine	-	-	-	-	-	-	-	-
52	Business, Mgmt, Marketing, Related Support Svcs	66.67	103.33	21.67	-	-	-	-	191.67
54	History	6.67	3.33	-	-	-	-	-	10.00
9999	Unknown	-	-	-	-	-	-	-	-
BLE	Bilingual Education	-	-	-	-	-	-	-	-
Total:		226.67	255.17	68.67	-	-	72.67	-	623.17

OIT SSCM Degree Completion data: Average 2012-13, 2013-14, 2014-15

CIP Code	CIP Description	Resident Degree Completions						Non-Resident	Total Degree Completions
		Non-Transfer BA/BS	Transfer BA/BS	Masters	PhD	First Professional	Graduate Certificates	PhD	
01	Agriculture	-	-	-	-	-	-	-	-
02	Agricultural Sciences (Legacy)	-	-	-	-	-	-	-	-
03	Natural Resources, Conservation	-	-	-	-	-	-	-	-
04	Architecture	-	-	-	-	-	-	-	-
05	Area, Ethnic, Cultural, Gender, Group Studies	-	-	-	-	-	-	-	-
09	Communication, Journalism	25.00	7.67	-	-	-	-	-	32.67
10	Communications Technologies	-	-	-	-	-	-	-	-
11	Computer and Information Science	8.67	12.67	-	-	-	-	-	21.33
13	Education	43.00	24.67	127.33	-	-	124.33	-	319.33
14	Engineering	-	-	-	-	-	-	-	-
15	Engineering Technologies	-	-	-	-	-	-	-	-
16	Foreign Languages, Literatures, Linguistics	21.67	11.00	0.50	-	-	-	-	33.17
19	Family and Consumer Sciences	-	-	-	-	-	-	-	-
22	Legal Professions and Studies	-	-	-	-	-	-	-	-
23	English Language and Literature	15.67	9.33	-	-	-	-	-	25.00
24	Liberal Arts and Sciences, Humanities	2.33	2.67	-	-	-	-	-	5.00
25	Library Science	-	-	-	-	-	-	-	-
26	Biological and Biomedical Sciences	13.33	5.33	-	-	-	-	-	18.67
27	Mathematics and Statistics	6.33	5.33	1.50	-	-	-	-	13.17
28	Military Science, Leadership, Operational Art	-	-	-	-	-	-	-	-
29	Military Technologies	-	-	-	-	-	-	-	-
30	Multi/Interdisciplinary Studies	53.67	44.00	1.50	-	-	-	-	99.17
30.01	Biological and Physical Sciences	-	-	-	-	-	-	-	-
30.06	Systems Science and Theory	-	-	-	-	-	-	-	-
30.08	Mathematics and Computer Science	1.33	0.67	-	-	-	-	-	2.00
30.18	Natural Sciences	-	0.67	-	-	-	-	-	0.67
31	Parks, Rec, Leisure, Fitness Studies	34.00	11.00	-	-	-	-	-	45.00
32	Basic Skills, Developmental/Remedial Education	-	-	-	-	-	-	-	-
34	Health Related Knowledge and Skills	-	-	-	-	-	-	-	-
38	Philosophy and Religious Studies	1.00	1.33	-	-	-	-	-	2.33
40	Physical Sciences	6.33	5.00	-	-	-	-	-	11.33
41	Science Technologies	-	-	-	-	-	-	-	-
42	Psychology	48.67	32.00	-	-	-	-	-	80.67
43	Homeland Security, Law Enforce, Protective Services	48.67	40.67	10.00	-	-	-	-	99.33
44	Public Administration and Social Services	-	-	-	-	-	-	-	-
45	Social Sciences and History	39.67	23.33	0.50	-	-	-	-	63.50
50	Visual and Performing Arts	30.00	11.33	4.33	-	-	-	-	45.67
51	Health Professions, Related Programs	35.33	9.00	8.00	-	-	-	-	52.33
51.20	Pharmacy	-	-	-	-	-	-	-	-
51.24	Veterinary Medicine	-	-	-	-	-	-	-	-
52	Business, Mgmt, Marketing, Related Support Svcs	54.67	35.00	9.33	-	-	-	-	99.00
54	History	5.33	5.00	3.33	-	-	-	-	13.67
9999	Unknown	-	-	-	-	-	-	-	-
BLE	Bilingual Education	-	-	-	-	-	-	-	-
Total:		494.67	297.67	166.33	-	-	124.33	-	1,083.00

OSU-Corvallis SSCM Degree Completion data: Average 2012-13, 2013-14, 2014-15

CIP Code	CIP Description	Resident Degree Completions						Non-Resident	Total Degree Completions
		Non-Transfer BA/BS	Transfer BA/BS	Masters	PhD	First Professional	Graduate Certificates	PhD	
01	Agriculture	172.67	59.67	15.67	1.33	-	0.50	7.00	256.83
02	Agricultural Sciences (Legacy)	-	-	-	-	-	-	-	-
03	Natural Resources, Conservation	108.00	66.00	26.67	6.67	-	9.33	9.33	226.00
04	Architecture	-	-	-	-	-	-	-	-
05	Area, Ethnic, Cultural, Gender, Group Studies	4.00	4.00	2.67	-	-	-	-	10.67
09	Communication, Journalism	51.00	20.00	-	-	-	-	-	71.00
10	Communications Technologies	-	-	-	-	-	-	-	-
11	Computer and Information Science	82.67	18.00	5.33	1.33	-	-	7.00	114.33
13	Education	45.00	10.00	64.33	13.00	-	98.33	13.00	243.67
14	Engineering	394.00	99.00	61.33	11.33	-	-	40.33	606.00
15	Engineering Technologies	-	-	-	-	-	-	-	-
16	Foreign Languages, Literatures, Linguistics	22.67	3.00	-	-	-	-	-	25.67
19	Family and Consumer Sciences	276.67	78.00	4.00	1.67	-	-	7.33	367.67
22	Legal Professions and Studies	-	-	-	-	-	-	-	-
23	English Language and Literature	40.67	12.67	6.00	-	-	-	-	59.33
24	Liberal Arts and Sciences, Humanities	73.00	26.67	-	-	-	-	-	99.67
25	Library Science	-	-	-	-	-	-	-	-
26	Biological and Biomedical Sciences	181.00	41.67	7.00	6.33	-	-	17.00	253.00
27	Mathematics and Statistics	19.33	3.67	6.33	1.00	-	-	4.67	35.00
28	Military Science, Leadership, Operational Art	-	-	-	-	-	-	-	-
29	Military Technologies	-	-	-	-	-	-	-	-
30	Multi/Interdisciplinary Studies	20.00	-	13.33	-	-	22.33	-	55.67
30.01	Biological and Physical Sciences	-	-	-	-	-	-	-	-
30.06	Systems Science and Theory	-	-	-	-	-	-	-	-
30.08	Mathematics and Computer Science	-	-	-	-	-	-	-	-
30.18	Natural Sciences	78.00	18.33	-	-	-	1.00	-	97.33
31	Parks, Rec, Leisure, Fitness Studies	127.67	29.00	8.00	0.67	-	-	5.00	170.33
32	Basic Skills, Developmental/Remedial Education	-	-	-	-	-	-	-	-
34	Health Related Knowledge and Skills	-	-	-	-	-	-	-	-
38	Philosophy and Religious Studies	7.33	2.00	0.50	-	-	0.67	-	10.50
40	Physical Sciences	49.00	24.00	7.67	5.67	-	-	24.00	110.33
41	Science Technologies	-	-	-	-	-	-	-	-
42	Psychology	89.67	32.33	-	-	-	-	-	122.00
43	Homeland Security, Law Enforce, Protective Services	-	-	-	-	-	-	-	-
44	Public Administration and Social Services	-	-	10.67	-	-	-	-	10.67
45	Social Sciences and History	133.67	55.33	7.67	2.67	-	35.33	7.33	242.00
50	Visual and Performing Arts	58.67	18.00	-	-	-	-	-	76.67
51	Health Professions, Related Programs	169.33	45.67	35.67	2.00	-	3.67	5.33	261.67
51.20	Pharmacy	-	-	0.50	0.50	68.33	-	4.67	74.00
51.24	Veterinary Medicine	-	-	-	-	38.00	-	-	38.00
52	Business, Mgmt, Marketing, Related Support Svcs	327.67	63.00	29.33	-	-	3.00	-	423.00
54	History	35.67	9.00	1.00	0.50	-	-	0.67	46.83
9999	Unknown	-	-	-	-	-	-	-	-
BLE	Bilingual Education	-	-	-	-	-	-	-	-
Total:		2,567.33	739.00	313.67	54.67	106.33	174.17	152.67	4,107.83

OSU-Cascades SSCM Degree Completion data: Average 2012-13, 2013-14, 2014-15

CIP Code	CIP Description	Resident Degree Completions						Non-Resident	Total Degree Completions
		Non-Transfer BA/BS	Transfer BA/BS	Masters	PhD	First Professional	Graduate Certificates	PhD	
01	Agriculture	-	-	-	-	-	-	-	-
02	Agricultural Sciences (Legacy)	-	-	-	-	-	-	-	-
03	Natural Resources, Conservation	4.33	10.00	-	-	-	-	-	14.33
04	Architecture	-	-	-	-	-	-	-	-
05	Area, Ethnic, Cultural, Gender, Group Studies	1.67	3.33	-	-	-	-	-	5.00
09	Communication, Journalism	0.33	-	-	-	-	-	-	0.33
10	Communications Technologies	-	-	-	-	-	-	-	-
11	Computer and Information Science	0.33	-	-	-	-	-	-	0.33
13	Education	-	-	54.00	-	-	28.00	-	82.00
14	Engineering	4.00	7.00	-	-	-	-	-	11.00
15	Engineering Technologies	-	-	-	-	-	-	-	-
16	Foreign Languages, Literatures, Linguistics	0.33	-	-	-	-	-	-	0.33
19	Family and Consumer Sciences	7.33	37.33	-	-	-	-	-	44.67
22	Legal Professions and Studies	-	-	-	-	-	-	-	-
23	English Language and Literature	-	-	-	-	-	-	-	-
24	Liberal Arts and Sciences, Humanities	7.67	16.33	-	-	-	-	-	24.00
25	Library Science	-	-	-	-	-	-	-	-
26	Biological and Biomedical Sciences	1.33	7.33	-	-	-	-	-	8.67
27	Mathematics and Statistics	-	-	-	-	-	-	-	-
28	Military Science, Leadership, Operational Art	-	-	-	-	-	-	-	-
29	Military Technologies	-	-	-	-	-	-	-	-
30	Multi/Interdisciplinary Studies	0.67	2.67	-	-	-	-	-	3.33
30.01	Biological and Physical Sciences	-	-	-	-	-	-	-	-
30.06	Systems Science and Theory	-	-	-	-	-	-	-	-
30.08	Mathematics and Computer Science	-	-	-	-	-	-	-	-
30.18	Natural Sciences	0.33	0.67	-	-	-	-	-	1.00
31	Parks, Rec, Leisure, Fitness Studies	10.67	14.00	-	-	-	-	-	24.67
32	Basic Skills, Developmental/Remedial Education	-	-	-	-	-	-	-	-
34	Health Related Knowledge and Skills	-	-	-	-	-	-	-	-
38	Philosophy and Religious Studies	-	-	-	-	-	-	-	-
40	Physical Sciences	0.33	-	-	-	-	-	-	0.33
41	Science Technologies	-	-	-	-	-	-	-	-
42	Psychology	2.00	8.67	-	-	-	-	-	10.67
43	Homeland Security, Law Enforce, Protective Services	-	-	-	-	-	-	-	-
44	Public Administration and Social Services	-	-	-	-	-	-	-	-
45	Social Sciences and History	2.67	3.33	-	-	-	-	-	6.00
50	Visual and Performing Arts	-	2.67	-	-	-	-	-	2.67
51	Health Professions, Related Programs	-	0.33	-	-	-	-	-	0.33
51.20	Pharmacy	-	-	-	-	-	-	-	-
51.24	Veterinary Medicine	-	-	-	-	-	-	-	-
52	Business, Mgmt, Marketing, Related Support Svcs	10.67	24.67	-	-	-	-	-	35.33
54	History	-	-	-	-	-	-	-	-
9999	Unknown	-	-	-	-	-	-	-	-
BLE	Bilingual Education	-	-	-	-	-	-	-	-
Total:		54.67	138.33	54.00	-	-	28.00	-	275.00

PSU SSCM Degree Completion data: Average 2012-13, 2013-14, 2014-15

CIP Code	CIP Description	Resident Degree Completions						Non-Resident	Total Degree Completions
		Non-Transfer BA/BS	Transfer BA/BS	Masters	PhD	First Professional	Graduate Certificates	PhD	
01	Agriculture	-	-	-	-	-	-	-	-
02	Agricultural Sciences (Legacy)	-	-	-	-	-	-	-	-
03	Natural Resources, Conservation	29.00	26.00	8.00	1.67	-	3.67	2.00	70.33
04	Architecture	27.33	11.67	25.67	-	-	1.67	-	66.33
05	Area, Ethnic, Cultural, Gender, Group Studies	12.33	11.67	-	-	-	12.33	-	36.33
09	Communication, Journalism	58.00	47.00	9.67	-	-	-	-	114.67
10	Communications Technologies	-	-	-	-	-	-	-	-
11	Computer and Information Science	31.67	27.33	13.00	1.33	-	0.50	3.33	77.17
13	Education	-	-	440.33	18.67	-	300.33	1.67	761.00
14	Engineering	97.00	65.00	70.33	2.67	-	5.33	2.33	242.67
15	Engineering Technologies	-	-	14.67	1.50	-	6.33	4.33	26.83
16	Foreign Languages, Literatures, Linguistics	73.00	41.67	4.67	-	-	7.33	-	126.67
19	Family and Consumer Sciences	29.00	34.00	-	-	-	14.67	-	77.67
22	Legal Professions and Studies	-	-	-	-	-	-	-	-
23	English Language and Literature	67.67	53.67	48.00	-	-	-	-	169.33
24	Liberal Arts and Sciences, Humanities	154.33	106.33	0.50	-	-	-	-	261.17
25	Library Science	-	-	-	-	-	-	-	-
26	Biological and Biomedical Sciences	97.00	66.67	6.00	3.00	-	-	1.33	174.00
27	Mathematics and Statistics	16.33	16.67	17.67	-	-	2.33	-	53.00
28	Military Science, Leadership, Operational Art	-	-	-	-	-	-	-	-
29	Military Technologies	-	-	-	-	-	-	-	-
30	Multi/Interdisciplinary Studies	17.67	7.33	17.67	-	-	19.33	-	62.00
30.01	Biological and Physical Sciences	79.00	44.67	8.00	-	-	-	-	131.67
30.06	Systems Science and Theory	-	-	6.00	2.00	-	-	1.00	9.00
30.08	Mathematics and Computer Science	-	-	-	-	-	-	-	-
30.18	Natural Sciences	-	-	-	-	-	-	-	-
31	Parks, Rec, Leisure, Fitness Studies	-	-	-	-	-	-	-	-
32	Basic Skills, Developmental/Remedial Education	-	-	-	-	-	-	-	-
34	Health Related Knowledge and Skills	-	-	-	-	-	-	-	-
38	Philosophy and Religious Studies	15.00	9.67	-	-	-	-	-	24.67
40	Physical Sciences	30.33	19.00	8.00	4.33	-	4.33	6.33	72.33
41	Science Technologies	-	-	-	-	-	-	-	-
42	Psychology	145.00	129.67	3.67	2.00	-	-	6.00	286.33
43	Homeland Security, Law Enforce, Protective Services	69.00	75.33	7.00	-	-	3.33	-	154.67
44	Public Administration and Social Services	40.00	50.00	242.67	5.00	-	4.67	3.33	345.67
45	Social Sciences and History	280.00	296.00	30.33	4.00	-	24.00	3.67	638.00
50	Visual and Performing Arts	134.67	74.67	20.00	-	-	-	-	229.33
51	Health Professions, Related Programs	161.67	121.33	71.33	1.00	-	0.67	-	356.00
51.20	Pharmacy	-	-	-	-	-	-	-	-
51.24	Veterinary Medicine	-	-	-	-	-	-	-	-
52	Business, Mgmt, Marketing, Related Support Svcs	286.67	295.67	98.00	-	-	77.00	-	757.33
54	History	33.33	34.00	6.33	-	-	-	-	73.67
9999	Unknown	-	-	-	-	-	-	-	-
BLE	Bilingual Education	-	-	-	-	-	-	-	-
Total:		1,985.00	1,665.00	1,177.50	47.17	-	487.83	35.33	5,397.83

SOU SSCM Degree Completion data: Average 2012-13, 2013-14, 2014-15

CIP Code	CIP Description	Resident Degree Completions						Non-Resident	Total Degree Completions
		Non-Transfer BA/BS	Transfer BA/BS	Masters	PhD	First Professional	Graduate Certificates	PhD	
01	Agriculture	-	-	-	-	-	-	-	-
02	Agricultural Sciences (Legacy)	-	-	-	-	-	-	-	-
03	Natural Resources, Conservation	10.67	3.67	4.00	-	-	-	-	18.33
04	Architecture	-	-	-	-	-	-	-	-
05	Area, Ethnic, Cultural, Gender, Group Studies	-	-	-	-	-	4.67	-	4.67
09	Communication, Journalism	22.67	5.33	-	-	-	-	-	28.00
10	Communications Technologies	-	-	-	-	-	-	-	-
11	Computer and Information Science	11.00	10.00	-	-	-	-	-	21.00
13	Education	30.67	22.67	91.33	-	-	138.33	-	283.00
14	Engineering	-	-	-	-	-	-	-	-
15	Engineering Technologies	-	-	-	-	-	-	-	-
16	Foreign Languages, Literatures, Linguistics	4.67	1.33	1.00	-	-	-	-	7.00
19	Family and Consumer Sciences	-	-	-	-	-	-	-	-
22	Legal Professions and Studies	-	-	-	-	-	-	-	-
23	English Language and Literature	14.33	6.67	-	-	-	-	-	21.00
24	Liberal Arts and Sciences, Humanities	-	-	-	-	-	-	-	-
25	Library Science	-	-	-	-	-	-	-	-
26	Biological and Biomedical Sciences	11.00	6.33	-	-	-	1.33	-	18.67
27	Mathematics and Statistics	6.67	3.00	0.50	-	-	-	-	10.17
28	Military Science, Leadership, Operational Art	-	-	-	-	-	-	-	-
29	Military Technologies	-	-	-	-	-	-	-	-
30	Multi/Interdisciplinary Studies	8.33	1.67	3.33	-	-	8.33	-	21.67
30.01	Biological and Physical Sciences	-	-	0.50	-	-	-	-	0.50
30.06	Systems Science and Theory	-	-	-	-	-	-	-	-
30.08	Mathematics and Computer Science	-	-	-	-	-	-	-	-
30.18	Natural Sciences	-	-	-	-	-	-	-	-
31	Parks, Rec, Leisure, Fitness Studies	24.33	8.67	-	-	-	-	-	33.00
32	Basic Skills, Developmental/Remedial Education	-	-	-	-	-	-	-	-
34	Health Related Knowledge and Skills	-	-	-	-	-	-	-	-
38	Philosophy and Religious Studies	-	-	-	-	-	-	-	-
40	Physical Sciences	10.00	2.00	-	-	-	-	-	12.00
41	Science Technologies	-	-	-	-	-	-	-	-
42	Psychology	39.00	18.67	-	-	-	-	-	57.67
43	Homeland Security, Law Enforce, Protective Services	29.00	13.67	-	-	-	-	-	42.67
44	Public Administration and Social Services	1.33	1.67	-	-	-	-	-	3.00
45	Social Sciences and History	28.33	14.67	-	-	-	1.67	-	44.67
50	Visual and Performing Arts	40.00	9.33	2.67	-	-	-	-	52.00
51	Health Professions, Related Programs	-	-	10.67	-	-	-	-	10.67
51.20	Pharmacy	-	-	-	-	-	-	-	-
51.24	Veterinary Medicine	-	-	-	-	-	-	-	-
52	Business, Mgmt, Marketing, Related Support Svcs	64.00	43.00	31.33	-	-	52.67	-	191.00
54	History	7.33	5.00	-	-	-	-	-	12.33
9999	Unknown	-	-	-	-	-	-	-	-
BLE	Bilingual Education	-	-	-	-	-	2.00	-	2.00
Total:		363.33	177.33	145.33	-	-	209.00	-	895.00

UO SSCM Degree Completion data: Average 2012-13, 2013-14, 2014-15

CIP Code	CIP Description	Resident Degree Completions						Non-Resident	Total Degree Completions
		Non-Transfer BA/BS	Transfer BA/BS	Masters	PhD	First Professional	Graduate Certificates	PhD	
01	Agriculture	-	-	-	-	-	-	-	-
02	Agricultural Sciences (Legacy)	-	-	-	-	-	-	-	-
03	Natural Resources, Conservation	57.67	17.67	3.00	-	-	-	0.67	79.00
04	Architecture	39.67	4.67	27.33	1.00	-	1.00	1.33	75.00
05	Area, Ethnic, Cultural, Gender, Group Studies	25.67	10.33	2.67	-	-	0.50	-	39.17
09	Communication, Journalism	254.00	44.67	18.33	1.00	-	1.33	6.00	325.33
10	Communications Technologies	-	-	-	-	-	-	-	-
11	Computer and Information Science	27.33	11.67	3.33	0.50	-	-	1.33	44.17
13	Education	47.33	9.00	114.33	17.00	-	176.00	7.67	371.33
14	Engineering	-	-	-	-	-	-	-	-
15	Engineering Technologies	-	-	-	-	-	-	-	-
16	Foreign Languages, Literatures, Linguistics	100.33	26.33	8.67	1.33	-	-	11.33	148.00
19	Family and Consumer Sciences	-	-	-	-	-	-	-	-
22	Legal Professions and Studies	-	-	0.33	-	59.00	-	-	59.33
23	English Language and Literature	63.33	22.33	2.67	2.67	-	-	8.00	99.00
24	Liberal Arts and Sciences, Humanities	11.67	2.67	-	-	-	-	-	14.33
25	Library Science	-	-	-	-	-	-	-	-
26	Biological and Biomedical Sciences	215.67	36.67	9.00	2.00	-	-	11.00	274.33
27	Mathematics and Statistics	27.00	6.67	0.67	1.00	-	-	5.33	40.67
28	Military Science, Leadership, Operational Art	-	-	-	-	-	-	-	-
29	Military Technologies	-	-	-	-	-	-	-	-
30	Multi/Interdisciplinary Studies	68.00	8.00	15.67	-	-	4.67	-	96.33
30.01	Biological and Physical Sciences	30.00	8.00	-	-	-	-	-	38.00
30.06	Systems Science and Theory	-	-	-	-	-	-	-	-
30.08	Mathematics and Computer Science	3.00	-	-	-	-	-	-	3.00
30.18	Natural Sciences	-	-	-	-	-	-	-	-
31	Parks, Rec, Leisure, Fitness Studies	-	-	-	-	-	-	-	-
32	Basic Skills, Developmental/Remedial Education	-	-	-	-	-	-	-	-
34	Health Related Knowledge and Skills	-	-	-	-	-	-	-	-
38	Philosophy and Religious Studies	26.67	9.00	1.67	1.00	-	-	3.00	41.33
40	Physical Sciences	45.67	16.67	21.00	4.33	-	-	24.67	112.33
41	Science Technologies	-	-	-	-	-	-	-	-
42	Psychology	168.33	75.67	7.33	3.33	-	-	16.33	271.00
43	Homeland Security, Law Enforce, Protective Services	-	-	-	-	-	-	-	-
44	Public Administration and Social Services	77.67	29.67	8.00	-	-	-	-	115.33
45	Social Sciences and History	428.33	136.67	8.00	4.67	-	-	17.00	594.67
50	Visual and Performing Arts	198.67	50.33	18.00	3.00	-	-	11.00	281.00
51	Health Professions, Related Programs	21.67	6.67	32.00	-	-	1.00	1.00	62.33
51.20	Pharmacy	-	-	-	-	-	-	-	-
51.24	Veterinary Medicine	-	-	-	-	-	-	-	-
52	Business, Mgmt, Marketing, Related Support Svcs	267.33	60.67	55.00	-	-	12.00	5.33	400.33
54	History	51.33	14.67	2.00	0.67	-	-	2.00	70.67
9999	Unknown	-	-	-	-	-	-	-	-
BLE	Bilingual Education	-	-	-	-	-	-	-	-
Total:		2,256.33	608.67	359.00	43.50	59.00	196.50	133.00	3,656.00

WOU SSCM Degree Completion data: Average 2012-13, 2013-14, 2014-15

CIP Code	CIP Description	Resident Degree Completions						Non-Resident	Total Degree Completions
		Non-Transfer BA/BS	Transfer BA/BS	Masters	PhD	First Professional	Graduate Certificates	PhD	
01	Agriculture	-	-	-	-	-	-	-	-
02	Agricultural Sciences (Legacy)	-	-	-	-	-	-	-	-
03	Natural Resources, Conservation	-	-	-	-	-	-	-	-
04	Architecture	-	-	-	-	-	-	-	-
05	Area, Ethnic, Cultural, Gender, Group Studies	-	-	-	-	-	-	-	-
09	Communication, Journalism	25.00	7.67	-	-	-	-	-	32.67
10	Communications Technologies	-	-	-	-	-	-	-	-
11	Computer and Information Science	8.67	12.67	-	-	-	-	-	21.33
13	Education	43.00	24.67	127.33	-	-	124.33	-	319.33
14	Engineering	-	-	-	-	-	-	-	-
15	Engineering Technologies	-	-	-	-	-	-	-	-
16	Foreign Languages, Literatures, Linguistics	21.67	11.00	0.50	-	-	-	-	33.17
19	Family and Consumer Sciences	-	-	-	-	-	-	-	-
22	Legal Professions and Studies	-	-	-	-	-	-	-	-
23	English Language and Literature	15.67	9.33	-	-	-	-	-	25.00
24	Liberal Arts and Sciences, Humanities	2.33	2.67	-	-	-	-	-	5.00
25	Library Science	-	-	-	-	-	-	-	-
26	Biological and Biomedical Sciences	13.33	5.33	-	-	-	-	-	18.67
27	Mathematics and Statistics	6.33	5.33	1.50	-	-	-	-	13.17
28	Military Science, Leadership, Operational Art	-	-	-	-	-	-	-	-
29	Military Technologies	-	-	-	-	-	-	-	-
30	Multi/Interdisciplinary Studies	53.67	44.00	1.50	-	-	-	-	99.17
30.01	Biological and Physical Sciences	-	-	-	-	-	-	-	-
30.06	Systems Science and Theory	-	-	-	-	-	-	-	-
30.08	Mathematics and Computer Science	1.33	0.67	-	-	-	-	-	2.00
30.18	Natural Sciences	-	0.67	-	-	-	-	-	0.67
31	Parks, Rec, Leisure, Fitness Studies	34.00	11.00	-	-	-	-	-	45.00
32	Basic Skills, Developmental/Remedial Education	-	-	-	-	-	-	-	-
34	Health Related Knowledge and Skills	-	-	-	-	-	-	-	-
38	Philosophy and Religious Studies	1.00	1.33	-	-	-	-	-	2.33
40	Physical Sciences	6.33	5.00	-	-	-	-	-	11.33
41	Science Technologies	-	-	-	-	-	-	-	-
42	Psychology	48.67	32.00	-	-	-	-	-	80.67
43	Homeland Security, Law Enforce, Protective Services	48.67	40.67	10.00	-	-	-	-	99.33
44	Public Administration and Social Services	-	-	-	-	-	-	-	-
45	Social Sciences and History	39.67	23.33	0.50	-	-	-	-	63.50
50	Visual and Performing Arts	30.00	11.33	4.33	-	-	-	-	45.67
51	Health Professions, Related Programs	35.33	9.00	8.00	-	-	-	-	52.33
51.20	Pharmacy	-	-	-	-	-	-	-	-
51.24	Veterinary Medicine	-	-	-	-	-	-	-	-
52	Business, Mgmt, Marketing, Related Support Svcs	54.67	35.00	9.33	-	-	-	-	99.00
54	History	5.33	5.00	3.33	-	-	-	-	13.67
9999	Unknown	-	-	-	-	-	-	-	-
BLE	Bilingual Education	-	-	-	-	-	-	-	-
Total:		494.67	297.67	166.33	-	-	124.33	-	1,083.00

Student Populations (3-year average) Summary

Student Population Data: Number of Degree Completers									
Targeted Characteristics	Average: 2012-13, 2013-14, 2014-15								
	EOU	OIT	OSU-Corvallis	OSU-Cascades	PSU	SOU	UO	WOU	Total
1	266.0	235.0	1,500.3	91.0	1,992.0	311.3	1,245.7	361.0	6,002.3
2	82.7	84.3	456.7	14.0	505.3	81.3	368.3	167.0	1,759.7
3	7.3	11.7	51.3	1.0	20.0	8.0	30.0	37.7	167.0
4	-	-	-	-	1.0	-	-	-	1.0

Four characteristics are targeted: Pell recipient, Rural High School, Underrepresented Minority, Veteran.

Dual Credit Hour Completions (3-year average) Summary

Dual Credit Completions	
Average: 2012-13, 2013-14, 2014-15	
EOU	4,849.3
OIT	3,552.0
OSU-Corvallis	-
OSU-Cascades	-
PSU	16,231.0
SOU	10,424.7
UO	-
WOU	-
Total	35,057.0

APPENDIX F: FY 15 FINAL DETAIL ALLOCATION TABLE

Final FY 2015 Detail Allocation Table

Prior year funding is a component of the SSCM, as it is the basis for any Stop Gain or Stop Loss calculations. The following table and memo outline final adjustments to FY15 RAM funding, which were incorporated into the FY16 SSCM true up process and calculations.

There was a \$4 discrepancy between the total funding available for RAM distribution and the calculated allocation amounts across all institutions. As a result, the detail allocation table over-reports resources distributed to institutions by \$4. A reconciliation between the original allocation plan and final funding distributions is provided and includes this adjustment.

2014-15 Detail Allocation Settle-Up (Page 1 of 2)

	EOU	OIT	OSU	OSU-CC	PSU	SOU	UO	WOU	Total Campuses	Operations	Other	Statewides	Total
Public University Support Fund													
Undergraduate Funding	6,539,733	7,308,379	38,439,070	1,084,589	37,159,255	6,788,592	26,514,701	9,112,436	132,946,755	-	-	-	132,946,755
Graduate Funding	521,292	94,216	26,762,541	401,867	12,050,242	986,478	15,992,338	1,158,790	57,967,764	-	-	-	57,967,764
<i>2014-15 Settle-up - Enrollment Funding</i>	<i>(175,659)</i>	<i>19,932</i>	<i>574,482</i>	<i>203,811</i>	<i>253,353</i>	<i>222,909</i>	<i>(690,625)</i>	<i>(408,203)</i>	-	-	-	-	-
Enrollment Funding - Cell Values	6,885,366	7,422,527	65,776,093	1,690,267	49,462,850	7,997,979	41,816,414	9,863,023	190,914,519	-	-	-	190,914,519
Incentive Funding	249,757	175,978	858,727	48,499	1,058,355	197,343	675,710	241,976	3,506,345	-	-	-	3,506,345
Subtotal Cell Funding and Incentives	7,135,123	7,598,505	66,634,820	1,738,766	50,521,205	8,195,322	42,492,124	10,104,999	194,420,864	-	-	-	194,420,864
Tuition Buydown Phase #1 (HB 5008)	302,335	581,590	3,381,590	94,253	2,285,178	732,135	2,133,023	489,896	10,000,000	-	-	-	10,000,000
<i>Tuition buydown Phase #1 - FY15 Settle-up</i>	<i>8,698</i>	<i>27,093</i>	<i>58,364</i>	<i>12,329</i>	<i>(2,888)</i>	<i>(27,928)</i>	<i>(45,545)</i>	<i>(30,123)</i>	-	-	-	-	-
Tuition Buydown Phase #2 (HB 5101)	681,259	1,107,390	6,572,645	187,470	4,813,648	1,492,861	4,507,769	1,184,578	20,547,620	-	-	-	20,547,620
<i>Tuition buydown Phase #2 - FY15 Settle-up</i>	<i>20,293</i>	<i>85,266</i>	<i>99,030</i>	<i>22,454</i>	<i>(40,554)</i>	<i>5,342</i>	<i>(126,576)</i>	<i>(65,255)</i>	-	-	-	-	-
Engineering Technology Undergraduate	-	1,504,281	-	-	6,930	-	-	-	1,511,211	-	-	-	1,511,211
<i>Eng Tech Undergrad - FY15 Settle-up</i>	<i>-</i>	<i>(1,772)</i>	<i>-</i>	<i>-</i>	<i>(2,869)</i>	<i>-</i>	<i>-</i>	<i>4,641</i>	-	-	-	-	-
Engineering Graduate	-	28,259	2,267,071	-	594,318	-	-	-	2,889,648	-	-	-	2,889,648
<i>Eng Tech Graduate - FY15 Settle-up</i>	<i>-</i>	<i>23,029</i>	<i>(67,796)</i>	<i>-</i>	<i>44,767</i>	<i>-</i>	<i>-</i>	<i>-</i>	-	-	-	-	-
Regional University Support Adjustment	2,835,488	2,696,084	-	2,490,212	-	1,907,486	-	1,522,848	11,452,118	-	-	-	11,452,118
<i>Regional University Support Adj - FY15 Settle-up</i>	<i>43,819</i>	<i>(34,170)</i>	<i>-</i>	<i>(49,761)</i>	<i>-</i>	<i>(79,446)</i>	<i>-</i>	<i>119,558</i>	-	-	-	-	-
Collaborative OUS Nursing Program	22,049	12,942	-	-	-	37,239	-	24,445	96,675	-	-	-	96,675
Total Enrollment, Incentives and Buydown Funding	11,049,064	13,628,497	78,945,724	4,495,723	58,219,735	12,263,011	48,960,795	13,355,587	240,918,136	-	-	-	240,918,136
Regional Funding													
Retrenchment	194,777	194,874	-	129,904	-	194,867	-	194,832	909,254	-	-	-	909,254
Retention & Graduation	340,860	341,028	-	227,331	-	341,019	-	340,955	1,591,193	-	-	-	1,591,193
Underpinning	340,860	341,028	-	227,331	-	341,019	-	340,955	1,591,193	-	-	-	1,591,193
11-13 Regional Support ¹	790,141	790,141	-	-	-	790,142	-	790,141	3,160,565	-	-	-	3,160,565
Regional Solutions	13,092	-	-	13,092	13,092	-	13,092	-	52,368	-	-	-	52,368
Statewide Access	-	830,642	-	-	-	-	-	-	830,642	-	-	-	830,642
Regional Access	848,153	365,155	-	-	-	273,858	-	91,272	1,578,438	-	-	-	1,578,438
Regional Funding	2,527,883	2,862,868	-	597,658	13,092	1,940,905	13,092	1,758,155	9,713,653	-	-	-	9,713,653
Research													
Sponsored Research	43,308	16,507	2,119,115	-	351,361	33,012	1,043,161	124,459	3,730,923	-	-	-	3,730,923
Faculty Salaries - Research	38,995	65,026	592,283	-	509,955	92,477	694,197	67,901	2,060,834	-	-	-	2,060,834
Research Funding	82,303	81,533	2,711,398	-	861,316	125,489	1,737,358	192,360	5,791,757	-	-	-	5,791,757
Other Institutes and Programs													
Campus Public Service Programs	221,924	-	-	-	570,890	99,008	541,094	1,525	1,434,441	-	-	-	1,434,441
Bldg. Maintenance / SWPS	-	-	1,784,820	-	-	-	-	-	1,784,820	-	-	-	1,784,820
IT Fifth Site/OCATE/Southwest Oregon/OWEN	590,738	478,020	-	-	582,869	478,020	404,461	478,020	3,012,128	478,020	-	-	3,490,148
Chancellor's Office Operations	-	-	-	-	-	-	-	-	-	158,424	-	-	158,424
Systemwide Expenses / Programs	55,268	52,517	780,126	-	239,294	126,784	695,421	147,622	2,097,032	-	1,679,655	-	3,776,687
Veterinary Diagnostic Lab	-	-	1,226,077	-	-	-	-	-	1,226,077	-	-	-	1,226,077
Health Professions Programs	276,031	2,264,004	-	-	-	380,845	-	307,927	3,228,807	-	-	-	3,228,807
PSU-NEW Leadership Oregon	-	-	-	-	65,468	-	-	-	65,468	-	-	-	65,468
Rural Access	253,079	-	-	-	-	-	-	-	253,079	-	-	-	253,079
PSU-Oregon Biodiversity Information Center (prev Natural H)	-	-	-	-	49,334	-	-	-	49,334	-	-	-	49,334
<i>HB 5201 one-time funding EOU & SOU</i>	<i>500,000</i>	<i>-</i>	<i>-</i>	<i>-</i>	<i>-</i>	<i>500,000</i>	<i>-</i>	<i>-</i>	<i>1,000,000</i>	<i>-</i>	<i>-</i>	<i>-</i>	<i>1,000,000</i>
<i>HB 5201 Extraordinary One-Time Compensation Costs</i>	<i>105,310</i>	<i>100,525</i>	<i>-</i>	<i>-</i>	<i>425,000</i>	<i>185,011</i>	<i>-</i>	<i>181,271</i>	<i>997,117</i>	<i>-</i>	<i>-</i>	<i>-</i>	<i>997,117</i>
<i>June E-Board Request - Initial Allocation Plan</i>	<i>576,262</i>	<i>616,268</i>	<i>-</i>	<i>-</i>	<i>-</i>	<i>614,606</i>	<i>-</i>	<i>534,711</i>	<i>2,341,847</i>	<i>-</i>	<i>-</i>	<i>-</i>	<i>2,341,847</i>
<i>E-Board Change from Initial Allocation Plan</i>	<i>(10,462)</i>	<i>(10,462)</i>	<i>-</i>	<i>-</i>	<i>-</i>	<i>(10,462)</i>	<i>-</i>	<i>(10,462)</i>	<i>(41,848)</i>	<i>-</i>	<i>-</i>	<i>-</i>	<i>(41,848)</i>
Other Institutes and Programs Funding	2,568,150	3,500,872	3,791,023	-	1,932,855	2,373,812	1,640,976	1,640,614	17,448,302	636,444	1,679,655	-	19,764,401
Total Public University Support Fund	16,227,400	20,073,770	85,448,145	5,093,381	61,026,998	16,703,217	52,352,221	16,946,716	273,871,848	636,444	1,679,655	-	276,187,947

2014-15 Detail Allocation Settle-Up (Page 2 of 2)

OUS State Programs

ETIC Allocations	-	-	-	-	-	-	-	-	-	-	-	-	-
Clinical Legal Education	-	-	-	-	-	-	-	-	-	-	172,154	-	172,154
Oregon Solutions (PSU)	-	-	-	-	1,114,521	-	-	-	1,114,521	-	-	-	1,114,521
Dispute Resolution	-	-	-	-	434,768	-	807,474	-	1,242,242	-	-	-	1,242,242
Oregon Climate Change Research Institute (OSU)	-	-	154,450	-	-	-	-	-	154,450	-	-	-	154,450
Industry Partnerships	-	-	-	-	-	-	-	-	-	-	327,955	-	327,955
Oregon Metals Initiative	-	-	-	-	-	-	-	-	-	-	-	-	-
Signature Research	-	-	244,016	-	25,687	-	244,038	-	513,741	-	-	-	513,741
Institute for Natural Resources (OSU Only)	-	-	197,040	-	-	-	-	-	197,040	-	-	-	197,040
OSU Fermentation Science	-	-	612,000	-	-	-	-	-	612,000	-	-	-	612,000
OSU Ocean Vessels Research	-	-	153,000	-	-	-	-	-	153,000	-	-	-	153,000
Labor Education Research Center (LERC-UO)	-	-	-	-	-	-	335,002	-	335,002	-	-	-	335,002
Population Research Center (PSU)	-	-	-	-	214,918	-	-	-	214,918	-	-	-	214,918
Subtotal OUS State Programs (ongoing)	-	-	1,360,506	-	1,789,894	-	1,386,514	-	4,536,914	-	-	500,109	5,037,023
Subtotal (previously E&G) ongoing	16,227,400	20,073,770	86,808,651	5,093,381	62,816,892	16,703,217	53,738,735	16,946,716	278,408,762	636,444	2,179,764	-	281,224,970
OSU Shellfish/Mollusca (one-time)	-	-	127,500	-	-	-	-	-	127,500	-	-	-	127,500
OSU Canola Research (one-time)	-	-	346,290	-	-	-	-	-	346,290	-	-	-	346,290
Subtotal (previously E&G) ongoing+one-time	16,227,400	20,073,770	87,282,441	5,093,381	62,816,892	16,703,217	53,738,735	16,946,716	278,882,552	636,444	2,179,764	-	281,698,760
AES	-	-	-	-	-	-	-	-	-	-	-	28,139,394	28,139,394
AES - E-Board	-	-	-	-	-	-	-	-	-	-	-	100,000	100,000
ES	-	-	-	-	-	-	-	-	-	-	-	20,353,858	20,353,858
FRL	-	-	-	-	-	-	-	-	-	-	-	3,096,094	3,096,094
Subtotal Statewide Public Services	-	-	-	-	-	-	-	-	-	-	-	51,689,346	51,689,346
Debt Service	-	-	-	-	-	-	-	-	-	-	45,907,800	-	45,907,800
Total State General Fund Allocation	16,227,400	20,073,770	87,282,441	5,093,381	62,816,892	16,703,217	53,738,735	16,946,716	278,882,552	636,444	48,087,564	51,689,346	379,295,906
Original FY2015 Total GF	16,090,954	19,788,876	85,759,634	4,856,049	61,506,728	16,395,459	53,925,771	17,094,584	275,418,055	636,444	51,593,909	51,689,346	379,337,754
Incentive Funding Distribution	249,757	175,978	858,727	48,499	1,058,355	197,343	675,710	241,976	3,506,345	-	(3,506,345)	-	-
E-Board Change from Initial Allocation Plan	(10,462)	(10,462)	-	-	-	(10,462)	-	(10,462)	(41,848)	-	-	-	(41,848)
Other Settle-Up Items (RAM, Tuition Buy-down, Eng. Tech., Reg. Support)	(102,849)	119,378	664,080	188,833	251,809	120,877	(862,746)	(379,382)	-	-	-	-	-
Rounding adjustment to match allotments	-	-	(3)	-	1	-	-	-	(2)	-	(2)	-	(4)
Final FY 2015 Allotment	16,227,400	20,073,770	87,282,438	5,093,381	62,816,893	16,703,217	53,738,735	16,946,716	278,882,550	636,444	48,087,562	51,689,346	379,295,902

The amendment resolves conflicts with SB 215, SB 224, SB 342, SB 493, SB 777, HB 2408, HB 2411, HB 2412, HB 3069, HB 3303, and HB 3524.

BACKGROUND:

Senate Bill 270 (2013) established governing boards for the University of Oregon and Portland State University, while providing a process for other universities in the Oregon University System (OUS) to also establish independent institutional boards. This restructuring of university governance ultimately led to the dissolution of OUS and State Board of Higher Education (SBHE), but numerous references to OUS, SBHE, and the OUS Chancellor remain in statutes. At the request Interim Committee on Education and Workforce Development, an informal work group met three times to review all relevant statutes that reference OUS, SBHE, and/or OUS Chancellor. The work group included involved parties including representatives from the office of Legislative Counsel, Higher Education Coordinating Committee, and OUS. Senate Bill 80 addresses higher education governance, and is intended as a vehicle to address references in current statute to entities that dissolved as a result of Senate Bill 270.

This summary has not been adopted or officially endorsed by action of the Committee.

BUDGET REPORT AND MEASURE SUMMARY

CARRIER: Sen. Monroe

Joint Committee On Ways and Means

Action: Do Pass With Amendments To The B-Eng Bill To Resolve Conflicts. (Printed C-Eng)

Action Date: 07/03/15

Vote:

Senate

Yeas: 12 - Burdick, Devlin, Girod, Hansell, Johnson, Monroe, Roblan, Shields, Steiner Hayward, Thomsen, Whitsett, Winters

House

Yeas: 12 - Buckley, Gomberg, Huffman, Komp, McLane, Nathanson, Rayfield, Read, Smith, Whisnant, Whitsett, Williamson

Prepared By: Bill McGee, Department of Administrative Services

Reviewed By: Paul Seibert, Legislative Fiscal Office

Agency: Department of Administrative Services

Biennium: 2015-17

Budget Summary

	2013-15 Legislatively Approved Budget	2015-17 Current Service Level	2015-17 Committee Recommendation	Committee Change from 2013-15 Leg. Approved	
				\$ Change	% Change
Other Funds Limited	\$ -	\$ -	\$ 637,294	\$ 637,294	100.0%

Position Summary

Authorized Positions	0	0	1	1
Full-time Equivalent (FTE) positions	0.00	0.00	1.00	1.00

Revenue Summary

The Other Funds expenditure limitation established in House Bill 3199 for the Department of Administrative Services (DAS), will be funded with State Government Service Charge assessments supporting the Capital Finance section of the DAS Chief Financial Office and direct charges to universities.

Summary of Education Subcommittee Action

House Bill 3199 establishes in statute the process for issuing State of Oregon general obligation bonds authorized under Article XI-F (1) and Article XI-G of the Oregon constitution for public university capital projects. Under the provisions of Senate Bill 270 (2013) that shifted the state's seven public universities from the Oregon University System to control by their own independent boards, the universities may continue to request the Legislative Assembly to authorize the issuance of bonds to finance capital projects. However, as the universities no longer constitute a state agency, a new statutory framework is required to verify compliance with the requirements of the constitution before the State Treasurer can issue bonds that have been approved by the legislature. The bill establishes a process to ensure compliance with the requirements of the constitution as well as federal tax law.

Under Article XI-G, bonds issued by the state must be matched on a one-to-one basis, generally with funds provided by the universities. Article XI-F (1) requires the universities to conservatively estimate that they will have sufficient revenues to pay debt service on the bonds and operate the projects financed with the proceeds of the bonds. House Bill 3199 includes provisions that require the state and the universities to enter into grant (Article XI-G bonds) and loan (Article XI-F (1) bonds) agreements to verify that the universities have the Article XI-G matching funds and are able to pay the Article XI-F (1) debt service. The agreements will also include provisions to ensure that the universities comply with federal tax requirements relating to the investment of borrowed funds before expenditure and the use, over time, of projects financed by the bonds.

The framework established by House Bill 3199 divides administrative responsibilities for the public university bond program between DAS and the Higher Education Coordinating Commission (HECC). DAS will manage the administration of the bond programs, including preparation of sale documents, consultation with bond counsel and the Treasurer's Office, and oversight of federal tax compliance. HECC will distribute bond proceeds to the institutions, make debt service payments with funds appropriated by the legislature and provided by the universities, and evaluate revenue sufficiency of Article XI-F (1) bonds and availability and sufficiency of matching amounts for Article XI-G bonds. DAS is given authority to adopt rules, in consultation with HECC, to establish fees to be charged to the universities to offset costs incurred by DAS and HECC, specify information to be provided by the universities for revenue sufficiency reviews, and proscribe practices to ensure federal tax compliance. DAS and HECC are authorized to bill the universities for costs related to the bond programs.

The bill also authorizes DAS to enter into agreements with the Oregon Health and Science University (OHSU) to receive debt service payments and administer tax compliance obligations relative to bonds issued to joint finance projects of OHSU and one or more public universities.

House Bill 3199 increases the Other Funds expenditure limitation for the DAS Chief Financial Office by \$637,294 and establishes one permanent full-time Operations and Policy Analyst 4 (1.00 FTE) to carry out DAS' responsibilities under the bill. House Bill 5024, the HECC appropriation bill, includes resources to allow HECC to perform its duties under the bill.

DETAIL OF JOINT COMMITTEE ON WAYS AND MEANS ACTION

HB 3199-C

Department of Administrative Services
 Bill McGee 503-378-2078

DESCRIPTION	GENERAL FUND	LOTTERY FUNDS	OTHER FUNDS		FEDERAL FUNDS		TOTAL ALL FUNDS	POS	FTE
			LIMITED	NONLIMITED	LIMITED	NONLIMITED			
<u>SUBCOMMITTEE RECOMMENDATION</u>									
SCR 035 Chief Financial Office									
Personal Services	\$	- \$	202,233 \$	- \$	- \$	- \$	-	1	1.00
Services and Supplies	\$	- \$	435,061 \$	- \$	- \$	- \$	-		
TOTAL SUBCOMMITTEE RECCOMENDATION	\$	- \$	637,294 \$	- \$	- \$	- \$	-	1	1.00

BUDGET REPORT AND MEASURE SUMMARY

CARRIER: Sen. Monroe

Joint Committee On Ways and Means

Action: Do Pass The A-Eng Bill.

Action Date: 06/23/15

Vote:

Senate

Yeas: 11 - Burdick, Devlin, Girod, Hansell, Johnson, Monroe, Roblan, Shields, Steiner Hayward, Whitsett, Winters

Nays: 1 - Thomsen

House

Yeas: 11 - Buckley, Gomberg, Huffman, Komp, McLane, Nathanson, Rayfield, Read, Whisnant, Whitsett, Williamson

Exc: 1 - Smith

Prepared By: Bill McGee, Department of Administrative Services

Reviewed By: Doug Wilson, Legislative Fiscal Office

Agency: Higher Education Coordinating Commission

Biennium: 2015-17

Budget Summary* **

	2013-15 Legislatively Approved Budget ⁽¹⁾	2015-17 Current Service Level	2015-17 Committee Recommendation	Committee Change from 2013-15 Leg. Approved	
				\$ Change	% Change
General Fund	\$ 1,335,076,631	\$ 1,330,729,447	\$ 1,603,739,374	\$ 268,623,703	20.1%
General Fund Debt Service	\$ 93,136,434	\$ 154,335,871	\$ 144,126,081	\$ 51,028,687	54.8%
Lottery Funds	\$ 10,546,223	\$ 15,243,816	\$ 20,056,379	\$ 9,510,156	90.2%
Lottery Funds Debt Service	\$ 35,092,516	\$ 42,781,168	\$ 42,349,776	\$ 7,257,260	20.7%
Other Funds Limited	\$ 29,155,451	\$ 26,224,905	\$ 27,136,059	\$ (2,019,392)	-6.9%
Other Funds Nonlimited	\$ 252,422	\$ 206,000	\$ 206,000	\$ (46,422)	-18.4%
Other Debt Service Limited	\$ 407,051	\$ -	\$ -	\$ (407,051)	-100.0%
Other Funds Debt Service Nonlimited	\$ 12,978,324	\$ -	\$ 224,585,215	\$ 211,606,891	1630.5%
Federal Funds Limited	\$ 107,788,824	\$ 111,219,540	\$ 111,772,952	\$ 3,984,128	3.7%
Federal Funds Nonlimited	\$ 18,968,831	\$ 18,968,831	\$ 18,968,831	\$ -	0.0%
Federal Funds Debt Service Nonlimited	\$ 1	\$ 1	\$ 2	\$ 1	100.0%
Total	\$ 1,643,402,708	\$ 1,699,709,579	\$ 2,192,940,669	\$ 549,537,961	33.4%

Position Summary

Authorized Positions	113	107	130	17
Full-time Equivalent (FTE) positions	104.02	102.61	118.85	14.83

⁽¹⁾ Includes adjustments through December 2014

* Excludes Capital Construction expenditures

** numbers for the 2013-15 Legislatively Approved Budget and 2015-17 Current Service Level include all the component agencies in the 2015-17 Committee Recommendation: the Higher Education Coordinating Commission, the Department of Community Colleges and Workforce Development, the Office of Student Access and Completion, and state support for public universities and the Oregon Health and Science University.

Revenue Summary

General Fund - Approximately 80.0 percent of the Higher Education Coordinating Commission (HECC)'s budget is funded with General Fund. This includes most of the cost of agency operations, support for community colleges and public universities, the Oregon Opportunity Grant program, workforce initiatives, and debt service.

Lottery Funds – Lottery Funds make up about 3.0 percent of HECC's budget and pay for debt service, Oregon Opportunity Grants, and intercollegiate athletics through the Sports Lottery program. The approved budget includes a significant increase in Lottery Funds allocated to the Oregon Opportunity Grant program.

Federal Funds – Federal Funds constitute about 6.0 percent of HECC’s budget. HECC receives a variety of federal grant funds under the Workforce Innovation and Opportunity Act. Grants include: Title IB that supports youth, adult, and dislocated worker training programs through the state’s One Stop Centers; Title II that funds adult basic education programs; and National Emergency Grants that offer training and reemployment services to workers in areas facing large layoffs. Other federal grant programs include Carl D. Perkins Vocational and Technical Education Act funds transferred from the Oregon Department of Education and Bureau of Land Management grants for youth employment opportunities through the Oregon Youth Conservation Corps. The Private Career Schools program operates a Veterans’ Education program under contract with the U.S. Veterans’ Administration.

Limited Other Funds – Limited Other Funds make up just over 1.0 percent of HECC’s budget. The Degree Authorization (DA), Private Careers Schools (PCS), and General Education Development (GED) programs are authorized to charge fees to authorize post-secondary institutions, license private career schools, and administer GED testing. GED fees were increased administratively in May 2013 and ratified by the Legislature in the 2013 session. Costs of administering the DA and PCS programs have exceeded available revenues and HECC has established new fees and increased existing ones administratively during the 2013-15 biennium. House Bill 5025 reauthorizes the administrative fee increases and Senate Bill 218 proposes new fees. The budget includes about \$0.8 million in new revenues from these fee increases.

Oregon Student Access and Completion (OSAC) administers nearly 500 different public and private scholarships, providing \$14.5 million in financial aid support. Administrative fees are charged to donors and granting agencies to cover the cost of operating the programs. Increasing costs and declining revenues have created a shortfall in administrative revenues that is partially restored with General Fund in the approved budget.

Most of the Other Funds revenues supporting the Oregon Youth Conservation Corps (OYCC) come from the Amusement Device Tax on video lottery terminals. OYCC also receives grants from the Oregon Marine Board and other agencies.

Nonlimited Other Funds - About 10.0 percent of HECC’s budget consists of expenditure authority to allow HECC to receive debt service payments from the public universities on general obligation bonds and Certificates of Participation that are repaid with institutional funds. For the last several biennia, these payments were not recorded in the state budget. With the dissolution of the Oregon University System, the expenditures need to be included in the budget.

Summary of Education Subcommittee Action

HECC is a 15-member commission appointed by the Governor and confirmed by the Senate. Its primary focus is strategic planning for the state’s public post-secondary education system. Other responsibilities include: developing goals and accountability measures for the post-secondary system; developing a strategic plan; developing a finance model for the higher education based on the strategic plan; and approving and authorizing degrees for the public universities.

The Degree Authorization program, transferred to HECC in 2012 from what was then the Oregon Student Access Commission (OSAC), evaluates and approves degree granting institutions and their programs that were not part of the OUS system, do not have regional accreditation, or offer

programs from a base outside of the state. The Private Career School program, transferred from the Oregon Department of Education in 2013, licenses career schools, approves their programs, and investigates complaints regarding their operations. In 2014, the Commission assumed the responsibilities of the State Board of Education as it relates to the community college system as well as assuming the responsibilities of the renamed Office of State Access and Completion (still OSAC).

House Bill 4018 (2014) established the Department of Community Colleges and Workforce Development (CCWD) as an office within HECC, effective July 1, 2015. CCWD funding and positions were transferred to the HECC budget as part of the 2015-17 current service level. Funding and positions for OSAC are transferred to HECC in the approved budget. The approved budget also transfers distribution of state support for the seven public universities that had been part of the Oregon University System and for the Oregon Health and Science University (OHSU) from the Department of Administrative Services (DAS) to HECC. Debt service on bonds sold or planned to be sold for OHSU continue to be included in the DAS budget.

The Subcommittee approved a budget of \$1,747,865,455 General Fund, \$62,406,155 Lottery Funds, \$2,192,940,669 total funds, and 118.85 FTE, which is an increase from the 2013-15 Legislatively Approved Budget by 22.4 percent, 36.7 percent, 33.4 percent and 14.3 percent respectively. All comparisons to the 2013-15 Legislatively Approved Budget and 2015-17 current service level budgets are made to the consolidated budgets for HECC, CCWD, OSAC, and state support for OUS and OHSU.

Major components of the approved budget include the following:

- The Public University Support Fund is increased to \$665 million General Fund, 27.2 percent above the 2013-15 Legislatively Approved Budget.
- The Community College Support Fund is increased to \$550 million General Fund, 17.9 percent above 2013-15 Legislatively Approved Budget.
- Funding for the Oregon Opportunity Grant program is increased to \$140.9 million total funds, 23.7 percent above Legislatively Approved Budget. At this level of funding approximately 84,000 recipients are expected to receive grants averaging \$1,650.
- State support for the three Oregon State University Statewide Public Service programs is increased by \$14.0 million above the 2015-17 current service level.
- Permanent funding of \$605,640 General Fund is approved for the Margaret Carter Skill Center at Portland Community College and the Sabin Schellenberg Professional Technical Center in Clackamas County, split equally between the two centers.
- Research and data analysis staff are transferred from the Chancellor's Office of the Oregon University System (OUS) to maintain the ability to analyze and report on post-secondary education. Resources are provided to support transfer of the OUS student data system to

HECC, consolidate and upgrade agency information systems, and continue with planning to upgrade OSAC's Financial Aid Management Information System.

- One-time federal grant funds are used to increase the ASPIRE and student outreach programs during the second year of the biennium. The number of ASPIRE sites is expected to increase from 145 to 257 by the end of the biennium.
- Funding and positions are provided to support community based efforts to help underserved students obtain a high school equivalency credential such as a General Education Degree (GED).
- To accommodate the consolidation of the several agencies into HECC, additional positions are approved for accounting, budget, human resources, information technology, and bond program management. Direction is provided to the agency to centralize all its administrative operations in a single unit to improve efficiency and effectiveness.
- Revenue from fee increases included in Senate Bill 218 and fee ratifications in House Bill 5025 will allow the Degree Authorization and Private Career Schools programs to address increasing workloads due to school closures, expansion of distance education, and implementation of the State Authorization Reciprocity Agreement (SARA).
- Funding for debt service on general obligation bonds, Lottery-backed bonds and Certificates of Participation (COP) paid with General Fund and Lottery Funds was adjusted to reflect updated payment schedules. In addition, the budget includes expenditure authority for payments by public universities on general obligation bonds and COPs repaid with institutional funds. With the elimination of OUS at the end of the 2013-15 biennium, these expenditures need to be recorded in the state budget.

HECC Operations

The HECC Operations program includes the commission, agency management, and staff units dedicated to research, university budget and finance, academic missions and programs, and legislative and public affairs.

The Subcommittee approved a budget of \$7,177,603 General Fund, \$7,351,097 total funds, and 26.00 FTE, which are 109.0 percent, 114.1 percent, and 144.1 percent above the 2013-15 Legislatively Approved Budget, respectively. The increases are the result of adding accounting, budgeting, human resources, procurement, and information systems resources to accommodate the consolidation of HECC, CCWD, OSAC, and funding for OHSU and the public universities. The increase also includes roll-up costs from 2013-15.

The Subcommittee took the following action:

- Approved the base budget and essential packages.
- Approved Package 231 that redistributes funds associated with the Engineering Technology Industry Council (ETIC) program. In 2014, the Legislature transferred the ETIC program from the Oregon University System to the Oregon Education Investment Board (OEIB). In

determining the current service level budget, a portion of the ETIC funding was transferred to this budget unit (HECC Operations) since OEIB was scheduled to sunset in March of 2016. Under the current plan, ETIC resources are going to be divided into two parts. Eighty percent, \$24.45 million General Fund, will be transferred to the Public Universities Statewide Programs unit in this agency to support engineering programs at various universities. The remaining \$6.11 million General Fund will be used as funding elsewhere in the state budget. This package transfers \$19.74 million General Fund from this unit to the Public Universities Statewide Programs where it is combined with another \$4.71 million from the remaining amount transferred from the OEIB budget.

- Approved Package 301 that recognizes the need to consolidate various business and support functions of the individual units of HECC into a central location. The units have previously contracted with DAS for human resources, payroll, accounting, contracts, budget, and IT services. This package is common across all the Operations units of HECC. In the HECC Operations unit of the budget, new positions are established for some of these functions, as outlined below. Some of the cost of these positions is offset by transfers from the other units that had been used to cover contracted services in prior biennia.

The package establishes six permanent positions (6.00 FTE) to provide core administrative functions. These are: an Information Systems Specialist 2 for help desk support; a Fiscal Analyst 2 to augment the existing limited budget staff from OSAC and CCWD; a Human Resources Specialist (HRA) 1 and an HRA 2 for the basic personnel functions of the agency; an Accounting Technician 2 for financial services; and an Information Systems Specialist 7 to provide systems development support for the existing and future information systems of the agency.

In addition, two additional permanent positions (2.00 FTE) are established for financial monitoring and accounting for the post-secondary education bonding programs assigned to HECC by House Bill 3199. HECC will share these responsibilities with DAS. The two positions are an Operations and Policy Analyst 3 and an Accountant 3. The package also includes a reclassification of an Information Systems Specialist (ISS) 2 position to an ISS 3.

Budget Note

The budget for the Higher Education Coordination Commission for 2015-17 moves some of the funding for administrative support services like finance, information technology and human resources, but the staff for these functions remain in the individual office or functional budget units. In the development of the 2017-19 budget, the Commission should prepare a budget which incorporates all administrative support related positions and associated resources into a single division or unit for the Commission.

- Approved Package 303 that permanently establishes five positions (5.00 FTE) within HECC to provide research, data collection, and analysis primarily relating to public universities in Oregon. These five positions had been part of the Chancellor's Office in the Oregon University System (OUS) and include three employees who transferred from OUS to HECC in June 2015. These positions are crucial in collecting data regarding student demographics, academic progress, and related trends. They provide analysis for policy makers in both the executive and legislative branches. They are also key in providing the data for distributing the Public Universities Support Fund between the seven institutions.

For 2013-15, HECC had an interagency agreement with the Chancellor's Office which made this staff available to HECC and policy makers; at its May 2014 meeting, the Emergency Board provided one-time funding to cover the costs of this agreement. This funding did not roll up into the current service level. The five positions are two Operations Analyst 4s, a Research Analyst 3, a Research Analyst 4, and an Information Systems Specialist 7.

- Approved Package 304 that provides \$381,317 General Fund for HECC to pay for various memberships in associations and organizations relating to post-secondary education. Most of resources are for the dues of the Western Interstate Commission on Higher Education (WICHE). Being a member of WICHE enables Oregon to enter into tuition reciprocity agreements with other western states. Other organizations include the Education Commission of the States and the State Higher Education Executive Officers Association. These membership costs had formally been paid by the Chancellor's Office which will no longer exist after June 30, 2015.
- Approved Package 802 that provides \$290,000 General Fund for information systems costs related to the consolidation of the components of the expanded agency. HECC presented a plan early in 2015 to address major issues with network servers and other systems of the former Department of Community Colleges and Workforce Development (CCWD). The plan also incorporated the needs of HECC as a new agency for information systems related issues. One component of this plan was transition of servers and other equipment to the state data center or its sub-contractors. The funding for the 2013-15 biennium came in part from the federal ALDER project which is no longer available as a funding source. This package provides the resources for the ongoing costs, including the assessments and charges paid to the state data center.
- Approved Package 804 that shifts funding on two HECC leadership positions from 100 percent General Fund to 80.0 percent General Fund, 10.0 percent Other Funds, and 10.0 percent Federal Funds. The two positions are the HECC Executive Director and the HECC Chief of Staff. This shift in funding better reflects the tie between the work performed by positions and the funding source for the respective programs. Total General Fund savings is \$99,494.
- Approved Package 808 that includes a technical adjustment to increase the Other Funds expenditure limitation by \$74,000 for a grant awarded through WICHE.

Degree Authorization/Private Career Schools

The Degree Authorization (DA) program approves requests by Oregon private institutions not exempted by statute, non-Oregon colleges, and other educational organizations to offer degrees entitled to academic credit in the state. The Private Career School (PCS) program licenses career schools, approves their programs, and investigates complaints regarding these schools. The Tuition Protection Fund assesses schools under PCS jurisdiction to offer partial reimbursement to students who attended private career schools and had funds or services due to them after the school went out of business. The Private Career School Program also has a contract with the U.S. Department of Veterans' Affairs for specific programs for veterans.

The Subcommittee approved a budget of \$2,646,524 total funds and 9.24 FTE. Funding is increased by seven percent above the 2013-15 Legislatively Approved Budget, while FTE is decreased by 7.6 percent, due to the phase-out of one-time General Fund support. The Subcommittee took the following action:

- Approved the base budget and essential packages.
- Approved Package 301 that recognizes the need to consolidate various business and support functions of the individual units of HECC into a central location. The units have previously contracted with DAS for human resources, payroll, accounting, contracts, budget, and IT services. This package is common across all the Operations units of HECC and this budget unit. This package transfers \$75,408 total funds to HECC Operations. In the HECC Operations unit of the budget, new positions are established for some of these functions. Some of these cost of these positions are offset by transfer of funds from the other units, (including this unit) that had been used to cover contracted services in prior biennia.
- Approved Package 302 that establishes one permanent Education Specialist 2 position (1.00 FTE) to meet the growing workload in regulating the various education entities under the jurisdiction of this unit. This package will better integrate these two programs which were combined in the past two years when the Office of Degree Authorization was transferred from what was then the Oregon Student Assistance Commission (OSAC) and the Private Career School program was transferred from the Oregon Department of Education. This will also assist the unit in implementing the State Authorization Reciprocity Agreement (SARA).

The current staff is facing increasing workload at this time due to school closures and difficult private post-secondary school cases leading to extensive investigations. Larger school closures create significant workload to coordinate with the federal government and other states, support and protect students, and to provide the documentation and investigations related to complaints and closures. With this in mind, \$150,000 of one-time Other Funds expenditure limitation is included in this package to provide funding to add temporary staff or to contract for other resources to address the increased workload. The Legislature should review the need for continuing this funding as well as the impact on ending balances from fee revenues during the 2017 Legislative Session.

This package also authorizes the reclassification of three positions between the two programs for a total cost of \$61,506 Other Funds. The reclassifications are based on desk audits of the positions and have been approved by DAS. Two Program Analyst 2 positions are reclassified to Education Specialist 1 and a Program Analyst 1 position is reclassified to an Operation and Policy Analyst 2.

This package is dependent on fee increases in Senate Bill 218 and the ratification of fees already in place by House Bill 5025. These fee increases provide the resources for both of the programs and negate the need for General Fund that was included in the 2013-15 budget. Total cost of this package is \$450,353 Other Funds.

CCWD Office Operations

This unit provides leadership, coordination, accountability, and technical assistance to Oregon's community colleges and local workforce investment programs on issues such as access to postsecondary instruction, education reform, college transfer, professional technical education,

lifelong learning, service to business, workforce training, accountability, funding, and diversity. The administration of federal Workforce Innovation and Opportunity Act programs is contained in this unit. The federal resources distributed to local providers are included in a separate program unit.

The Subcommittee approved a budget of \$16,846,859 General Fund, \$33,697,676 total funds, and 54.70 FTE. General Fund and total funds are increased by 20.0 percent and 6.8 percent from the 2013-15 Legislatively Approved Budget respectively. The increases in funding are largely the result of a new program to help students without high school diplomas complete GEDs and adjusting funding of several positions based on actual workloads. The Subcommittee took the following action:

- Approved the base budget and essential packages.
- Approved Package 301 that recognizes the need to consolidate various business and support functions of the individual units of HECC into a central location. The units have previously contracted with DAS for human resources, payroll, accounting, contracts, budget, and IT services. This package is common across all the Operations units of HECC. In the HECC Operations unit of the budget, new positions are established for some of these functions. Some of the costs for these positions are offset by transfer of funds from the other units that had been used to cover these contracted services in prior biennia. This package transfers \$217,523 total funds to HECC Operations.
- Approved Package 311 that reconciles the funding of eight positions formally part of CCWD to reflect the actual work they perform. This problem was temporarily addressed in the 2013-15 biennium during the February 2014 Session. This package permanently addresses the problem. The current budget has the equivalent of 8.65 FTE funded with General Fund resources and this package increases this to 13.00 FTE. Most of these eight positions are central support positions, supporting the entire HECC scope of programs, which are primarily General Fund programs. Total General Fund cost of this package is \$963,679.
- Approved Package 801 that provides \$2.0 million General Fund of support to underserved students to obtain a high school equivalency credential such as a GED. The program will be directed at the estimated 10,000 students up to age 25 who do not have a high school diploma. Services will be provided through community based organizations currently serving the target population and existing criteria would be used. There are two permanent positions (2.00 FTE) established in the package who will work on unifying the use of these tests across the systems, identifying eligible community based organizations and distributing GED scholarship grants through the organizations.
- Approved Package 804 that shifts the funding for the Deputy Commissioner position from a mix of General Fund and Federal Funds to 100 percent Other Funds and Federal Funds. This position is transitioning to fully focusing on workforce development activities instead of spending part of the time on community college related activities. This package saves \$146,470 General Fund.
- Approved repurposing some of the \$10.9 million General Fund included in the 2015-17 current service level for workforce programs as follows:
 - Funds for the Work Ready Communities program, which includes National Career Readiness Certificates (NCRC), is increased from \$750,000 to \$1.0 million.

- Support for local workforce investment boards to lead local sector strategies and other efforts to increase community and industry competitiveness is funded at \$2.5 million.
- Technical assistance for local workforce areas is funded at \$1.0 million.
- An allocation of \$400,000 is provided for identification and dissemination of best practices among local workforce investment boards.
- Funding for Back to Work Oregon on-the-job training and NCRC programs included in the 2011-13 and 2013-15 budgets is reduced from \$6.2 million to \$5.0 million.
- A separate allocation of \$1.5 million for the NCRC program is eliminated, as is \$1.5 million for the Supporting Sector Strategies program.

State Support to Community Colleges

This unit contains the Community College Support Fund (CCSF), as well as other state support for community college operations throughout the state. Other Funds and Federal Funds supporting the colleges are included in a separate program unit. HECC plans to implement a new allocation model for distributions of the CCSF, beginning in the second year of the 2015-17 biennium, that will include completion as well as enrollment.

The Subcommittee approved a budget of \$550,605,640 General Fund and \$45,810 Other Funds. This represents a 18.3 percent increase from the 2013-15 Legislatively Approved Budget, respectively. No FTE are included in this unit. The Subcommittee took the following action:

- Approved the base budget and essential packages.
- Approved Package 111 that increases the amount the state provides to the community colleges for general education services for developmental education, classes leading to an associate’s degree, classes used for credit at a four-year college or university, classes leading to a certification, and related costs of the colleges. The \$95.0 million General Fund provided in this package brings the total funding for this program to \$550 million -- a 20.9 percent increase over the current service level and a 18.3 percent increase over the amount available for 2013-15.

Distribution of these funds to the 17 community college will follow the existing distribution formula for the first year of the biennium based on student FTE and including the enrollment caps that affect some of the colleges. It is anticipated that HECC will implement a performance based distribution formula for the second year of the biennium in part based on student completion of degrees and certificates.

Budget Note

Prior to the final adoption of any significant change to the distribution of the Community College Support Fund, the Higher Education Coordinating Commission is directed to consult with the appropriate legislative committees including the interim policy committees with jurisdiction on post-secondary education issues and the interim Joint Committee on Ways and Means or the Emergency Board on the proposed distribution change.

- Approved Package 803 that provides permanent funding for the Margaret Carter Skill Center at Portland Community College and the Sabin Schellenberg Professional Technical Center in Clackamas County. Funding of \$605,640 General Fund is split evenly between the two centers.

CCWD Federal/Other Programs

This unit contains Other Funds and Federal Funds that are distributed to community colleges, local workforce service areas, and other local providers. Funding is primarily received from the Workforce Innovation and Opportunity Act and Perkins Vocational and Technical Education Act. The Subcommittee approved a total funds budget of \$115,328,803 which is 2.5 percent above the 2013-15 Legislatively Approved Budget. No FTE are included in this unit. The Subcommittee approved the base budget and essential packages.

Oregon Youth Conservation Corps

The Oregon Youth Conservation Corps (OYCC) was established in 1987 for the purpose of providing education, training, and employment opportunities for disadvantaged and at-risk youth ages 16 to 25. OYCC's goals are to improve work skills, instill work ethic, and increase employability. Jobs are created through partnerships with public natural resource agencies.

The Subcommittee approved a budget of \$3,657,974 total funds and 3.00 FTE. Total funds are 0.8 percent above the 2013-15 Legislatively Approved Budget while FTE is unchanged. The Subcommittee approved the base budget and essential packages.

CCWD Debt Service

Debt Service on Article XI-G bonds and Lottery Bonds sold to finance community college capital projects are budgeted in this program unit. Debt service on Article XI-G bonds is paid with General Fund; Lottery bonds debt service is paid with Lottery Funds.

The Subcommittee approved a budget of \$24,637.915 General Fund, \$10,462,066 Lottery Funds, and \$35,099,982 total funds. General Fund and Lottery Funds are increased above the 2013-15 Legislatively Approved Budget by 49.0 percent and 9.9 percent respectively while total funds are reduced by 11.0 percent, due to the elimination of one-time expenditure authority needed for a bond refinancing. No FTE are included in this unit.

The Subcommittee took the following action:

- Approved the base budget and essential packages.
- Approved Package 811 that modifies costs based on up-to-date debt service requirements available at this time. These adjustments reflect: projects without identified required match that can't go forward at this time; savings generated through refinancing of outstanding bonds; and savings due to lower than projected payments for 2015-17. The adjustments total \$13,778,576 General Fund and \$232,169 Lottery Funds in savings.

Public University Support Fund

The Public University Support Fund (PUSF) represents the state's General Fund contribution to operation of the Oregon's seven public universities' education, student support, research, and public service programs. Combined with student tuition and other revenues that are not included in the state budget, the funds provide basic support to the educational institutions, their institutional boards, administration functions, and student support services.

The Subcommittee approved a budget of \$665,000,000 General Fund, which is 27.2 percent above the 2013-15 Legislatively Approved Budget. No FTE are included in this unit. The Subcommittee took the following action:

- Approved Package 100 that transfers the budget for this and other units that historically funded the Oregon University System from the Department of Administrative Services to HECC. This change reflects the role of HECC and the Commission's relationship with the public universities after passage of legislation over the past two biennium eliminating the university system and establishing independent boards. The change also reflects the requirements of ORS 351.052 as amended by Senate Bill 219 (2015) requiring that funding requests for public universities approved by the Legislature shall be appropriated to HECC. All current service level adjustments are made for this budget unit prior to the transfer to HECC by this package.
- Approved Package 102 that increases the amount provided by the state to the seven public universities by \$151.4 million General Fund, which represents a 29.5 percent increase from the current service level for 2015-17 and a 27.2 percent increase from the 2013-15 budget.

Budget Note

The additional \$30.0 million post-revenue forecast allocation for the biennium is to be used to fund campus investments in targeted tuition remissions for undergraduate Oregonians, and programs to improve student graduation. These would be programs detailed previously by the universities to the HECC for how they would use additional investments addressing access, affordability, and student success. The seven universities will commit to continuing these investments in both years of the biennium. The universities will report to HECC, and legislative committees, how they have invested the funds. All additional funds will flow through the Student Success and Completion Model (SSCM).

Agricultural Experiment Station

This budget unit provides state General Fund support for Agricultural Experiment Stations. The stations, operated by Oregon State University conduct research and demonstrations in the agricultural, biological, social, and environmental sciences. Research is conducted at a central station at Corvallis and at eleven branch stations in major crop and climate areas of the state.

The Subcommittee approved a budget of \$63,121,066 General Fund, which is 14.4 percent above the 2013-15 Legislatively Approved Budget. No FTE are included in this unit. The Subcommittee took the following action:

- Approved Package 100 that transfers distribution of funds for this program unit from the Department of Administrative Services to HECC. The transfer includes the 2015-17 current service level for the program unit.
- Approved Package 805 that increases the funding for the Agricultural Experiment Station by \$6,125,000, its share of the \$14.0 million General Fund provided to the three Statewide Public Service programs operated by Oregon State University.

Budget Note

Oregon State University shall provide a report to the Legislative Assembly for consideration during the 2016 legislative session regarding the implementation of programs and activities enabled by the \$14.0 million funding increase for the Statewide Public Service Programs – the Agricultural Experiment Station, the Extension Service, and the Forest Research Laboratory. This report should identify the progress made in hiring additional staff and researchers, and the various activities undertaken and planned for the remainder of the 2015-17 biennium and into the future.

Extension Service

This budget unit provides state General Fund support for the Extension Service. The Extension Service is the educational outreach arm of Oregon State University in its capacity as Oregon’s land, sea, space, and sun grant university. Extension faculty on campus and in county offices throughout the state work with researchers and volunteers to develop and deliver non-credit educational programs based on locally identified needs. Generally, counties provide office space and operating expenses, including support staff. Programs are delivered with the assistance of thousands of volunteers.

The Subcommittee approved a budget of \$45,601,540 General Fund, which is 14.0 percent above the 2013-15 Legislatively Approved Budget. No FTE are included in this unit.

The Subcommittee took the following action:

- Approved Package 100 that transfers distribution of funds for this program unit from the Department of Administrative Services to HECC. The transfer includes the 2015-17 current service level for the program unit.
- Approved Package 805 that increases the budget for the Extension Service by \$4,375,000, its share of the \$14.0 million General Fund provided to the three Statewide Public Service programs operated by Oregon State University.

Forest Research Laboratory

This budget unit provides state General Fund support for the Forest Research Laboratory at Oregon State University. The Forest Research Laboratory conducts research on sustainable forest yields, use of forest products, and stewardship of Oregon's resources. This research is conducted in laboratories and forests administered by the university and cooperative agencies and industries throughout the state. Research results are made available to potential users through educational programs and publications that are directed to forest landowners and managers, manufacturers and users of forest products, leaders of government and industry, the scientific community, the conservation community, and the general public.

The Subcommittee approved a budget of \$9,771,107 General Fund, which is 61.0 percent above the 2013-15 Legislatively Approved Budget. No FTE are included in this unit. The Subcommittee took the following action:

- Approved Package 100 that transfers distribution of funds for this program unit from the Department of Administrative Services to HECC. The transfer includes the 2015-17 current service level for the program unit.
- Approved Package 805 that increases the budget for the Extension Service by \$3,500,000 General Fund, its share of the \$14.0 million General Fund provided to the three Statewide Public Service programs operated by Oregon State University.

Public University State Programs

This budget unit includes General Fund support for a variety of institutions, centers, and programs operated by public universities that address economic development, natural resource and other issues rather than providing support general support for instruction and student support services. Many of these programs have an industry-specific focus, matching state support with funds from private sector and other sources.

The Subcommittee approved a budget of \$34,298,725 General Fund, which is 34.5 percent above the 2013-15 Legislatively Approved Budget. The increase is due to transfer of ETIC funds from OEIB and within the HECC budget and does not reflect an increase in total program funding beyond inflation. No FTE are included in this unit.

The Subcommittee took the following action:

- Approved Package 100 that transfers distribution of funds for this program unit from the Department of Administrative Services to HECC. The transfer includes the 2015-17 current service level for the program unit. The current service level amount transferred to HECC for each public program is as outlined in the table on the following page:

Program	2015-17 Approved Budget
UO & PSU Dispute Resolution programs	\$2,516,149
PSU Oregon Solutions program	\$2,257,451
OSU Fermentation Program	\$1,239,600
UO, OSU, & PSU Signature Research Centers	\$1,040,577
Oregon Metals Initiative	\$749,065
UO Labor Education Research Center (LERC)	\$678,544
OSU Marine Research Vessel Program	\$619,800
PSU Population Research Center	\$435,313
OSU Natural Resources Institute	\$399,103
Clinical Legal Education program	\$348,077
OSU Climate Change Research Institute	\$312,837

- Approved Package 801 that transfers the \$749,065 General Fund support for the Oregon Metals Initiative to the Oregon Business Development Department (OBDD). An equal amount of General Fund will be added for the same purpose in the OBDD budget, which has approximately \$2.0 million Lottery Funds allocated as additional support for the program. This change will allow all state support for the Oregon Metals Initiative to be consolidated in one budget.
- Approved Package 806 that redistributes funds associated with the Engineering Technology Industries Council (ETIC) program. In 2014, the Legislature transferred the ETIC program from the Oregon University System to the Oregon Education Investment Board (OEIB). In determining the Current Service Level (CSL) budget, a portion of the ETIC funding was transferred to HECC Operations budget since OEIB was scheduled to sunset in March of 2016. Under the current plan, ETIC resources are going to be divided into two parts. Eighty percent, \$24.45 million General Fund, was transferred into this budget unit for the engineering programs at various public universities. The remaining \$6.11 million General Fund will be used as funding for other programs in state government.

Public University Debt Service

This program includes the cost of debt service on capital construction and information systems projects financed with bonds and Certificates of Participation (COPs). Debt service on Article XI-G bonds is paid with General Fund; Lottery bonds debt service is paid with Lottery Funds. Payment of debt service on Article XI-Q bonds, SELP loans, and COPs is split between General Fund and campus funds, depending on how each project was authorized. All debt service on Article XI-F (1) bonds is paid with campus funds.

Debt service on bonds and COPs paid with campus funds has not been included in the state budget for several biennia. With the elimination of the Oregon University System and the creation of independent boards for each of the seven universities, government accounting standards require that it be included in the budget. Package 811 includes Other Funds Nonlimited expenditure authority so that HECC can receive funds from the universities and make the debt service payments.

The Subcommittee approved a budget of \$119,704,939 General Fund, \$31,887,710 Lottery Funds, and \$376,177,865 total funds. General Fund and Lottery Funds are increased by 34.3 percent and 24.7 percent respectively from the 2013-15 Legislative Assembly. Total funds are increased by 227.9 percent to record debt service payments made by the institutions rather than by the state on the state's budget; in recent biennia, these payments were only carried on university budgets. No FTE are included in this unit.

The Subcommittee took the following action:

- Approved Package 100 that transfers distribution of funds for this program unit from DAS to HECC. The transfer includes the 2015-17 current service level for the program unit.
- Approved Package 811 that modifies costs based on up-to-date debt service requirements available at this time. These adjustments reflect: projects without identified required match that can't go forward at this time; savings generated through refinancing of outstanding bonds; and savings due to lower than projected payments for 2015-17. Adjustments total \$10,170,750 General Fund and \$269,661 Lottery Funds

in savings that are used elsewhere in the budget. This package also recognizes outstanding debt service for general obligation bonds and certificates of participation that had been issued for the benefit of public universities and repaid from sources other than the state General Fund and Lottery Funds. This outstanding debt service will be paid with resources received from the public universities. With the elimination of the Oregon University System, legal counsel has provided advice that debt service payments due on state issued debt must be included in the state budget. These payments will be sent by universities to HECC, which will record the transactions on its' accounts. The estimated amount of Other Funds Nonlimited expenditures for paying self-supported university debt is \$224,585,215 for 2015-17.

Sports Lottery

This budget unit includes the one percent of Lottery Funds deposited into the Department of Administration Services Economic Development Fund that is transferred to the Sports account to finance intercollegiate athletics and graduate student scholarships. Eighty-eight percent of the revenues deposited into the Sports Lottery Account are used to finance intercollegiate athletics. The remaining 12.0 percent are for graduate student scholarships that are not awarded on the basis of athletics. Of the athletic funds, 70.0 percent must be used for non-revenue producing sports, and at least 50.0 percent must be used for women's athletics.

The Subcommittee approved a budget of \$8,240,000, which is 3.0 percent above the 2013-15 Legislatively Approved Budget. No FTE are included in this unit.

The Subcommittee took the following action:

- Approved Package 100 that transfers distribution of funds for this program unit from DAS to HECC. The transfer includes the 2015-17 current service level for the program unit.
- Approved Package 807 that reduces Lottery Funds by \$3,157,647 to make a total of \$8.24 million Lottery Funds available for the 2015-17 biennium. The package implements a policy decision to continue to cap the Sports Lottery distribution to public universities at \$8.24 million for the biennium, the same level provided in 2013-15 adjusted for inflation. The remaining \$8.24 million Lottery Funds is to be distributed as follows:

University	2015-17 Approved Budget
Eastern Oregon University	\$913,239
Oregon Institute of Technology	\$913,239
Southern Oregon University	\$913,239
Western Oregon University	\$1,162,716
Portland State University	\$2,277,567
Oregon State University	\$1,030,000
University of Oregon	\$1,030,000
TOTAL	\$8,240,000

Oregon Health and Science University

This budget unit includes all direct state payments to OHSU that support the university’s education and rural programs. The state also contributes a significant amount of other funding to OHSU mainly through funding health services for state employees and clients through the Oregon Health Plan. The current service level amounts for each of the programs in this budget unit are as follows:

Program	CSL Funding for 2015-17
School of Medicine	\$24,770,841
School of Nursing	\$21,422,479
School of Dentistry	\$10,039,481
Office of Rural Health/Area Health Education Centers (AHEC)	\$4,388,996
Scholars for a Healthy Oregon	\$5,165,000
Child Development & Rehabilitation Center (CDRC)	\$7,964,430
Oregon Poison Center	\$2,548,619
Primary Health Care Loan Forgiveness Program	\$1,033,000

The Subcommittee approved a budget of \$77,332,846 General Fund, which is 6.6 percent above the 2013-15 Legislatively Approved Budget. No FTE are included in this unit. The Subcommittee approved Package 100 that transfers distribution of funds for this program unit from DAS to HECC. The transfer includes the 2015-17 current service level for the program unit.

OSAC Office Operations

This program unit includes all Office of Student Access and Completion (OSAC) staff with the exception of those working on the ASPIRE program; all ASPIRE expenditures are included in a separate program unit. Office Operations is responsible for all agency-wide administrative

functions including budget formulation, fiscal control, personnel administration, and information. Staff in this unit administer all scholarship and financial aid programs operated by the Office, other than ASPIRE.

The Subcommittee approved a budget of \$3,282,811 General Fund, \$6,066,075 total funds, and 18.77 FTE. General Fund and total funds are increased by 56.4 percent and 29.5 percent above the 2013-15 Legislatively Approved Budget, while FTE is reduced by 4.6 percent. The increase in funding is primarily due to one-time funding to replace an aging data system and to support reduced revenues in the private scholarship programs.

The Subcommittee took the following action:

- Approved Package 070 that reflects the combination of falling revenues due to the loss of one of the major scholarship programs administrated by OSAC and the consequences of transferring costs to Other Funds revenue over recent biennia. The result is that there is insufficient revenue to cover Other Funds expenditures in the current service level. Most of this revenue is from charges to various organizations that contract with OSAC to administer their scholarship programs. OSAC charges a fee for direct and indirect (e.g., rent) administrative costs. OSAC's two major donor organizations are concerned about any further fee increases, so the agency now must take actions to manage within available revenues. This package reduces expenditures by \$510,485 Other Funds and positions by 3.67 FTE. Package 214 restores some of these resources.
- Approved Package 100 that transfers the budget for this unit from the Office of Student Access and Completion to HECC. This change reflects legislation passed in a previous session which folded OSAC into HECC. All current service level adjustments are made for this budget unit prior to the transfer to HECC by this package.
- Approved Package 131 that funds Services and Supplies costs to reprogram OSAC's information technology system as a result of changes to the Oregon Opportunity Grant program included in House Bill 2407. These changes relate to eligibility, grant amounts, priority awards, award guarantees, and application deadlines. Implementing these changes will require significant reprogramming of the OSAC's Financial Aid Management Information System (FAMIS) used to process Free Application for Federal Student Aid (FAFSA) data used to determine student eligibility and award amounts. System changes are estimated to cost \$250,000 General Fund in the 2015-17 biennium. OSAC is also seeking funding in Package 313 to make major improvements in the FAMIS system overall. The agency should integrate work funded by this package with the major improvements resulting from efforts that are part of Package 313.
- Approved Package 213 that funds activities to increase the awareness of post-secondary opportunities among students across the state. The package is funded with federal College Access Challenge Grant funds for the second year of the biennium and should be considered one-time revenue given that the state must meet specific post-secondary spending levels to be eligible. The staff (4 positions; 0.77 FTE) included in this package will: travel throughout the state providing information on financial aid, the FAFSA, and scholarships; coordinate expansion of College Goal Sunday and the FAFSA Completion Pilot; and provide FAFSA training and technical assistance to ASPIRE sites. The package increases federal funding by \$731,958 and includes \$600,000 for grants to OSAC partners.

- Approved Package 214 that restores a portion of the staff and other resources lost in Package 070 due to falling revenues. One-time General Fund resources of \$300,687 restore funding for 2.00 FTE (permanent) of the 3.67 FTE eliminated in Package 070. The agency should report back to the Joint Committee on Ways and Means during the 2017 Legislative Session on the funding as well as the direct and indirect costs of the scholarship programs and whether the program is sustainable with current fees charged the organizations offering the scholarship. The program is unique and does offer a “one-stop” place to apply for a number of different scholarship opportunities. At the same time, the question must be addressed if this is a function that should be paid in part with General Fund.

- Approved Package 301 that recognizes the need to consolidate various business and support functions of the individual units of HECC into a central location. The units have previously contracted with DAS for human resources, payroll, accounting, contracts, budget, and IT services. This package is common across all the Operations units of HECC and this budget unit. In the HECC Operations unit, new positions are established for some of these functions. A portion of the cost is offset by transfers from the other units, (including this unit), of funds that had been used to cover these contracted services in prior biennia.
 - Approved Package 313 that includes funding to complete a business case for replacement of OSAC’s Financial Aid Management Information System (FAMIS) that processes FAFSA data and determines student eligibility and award amounts for the Opportunity Grants and other student aid programs. FAMIS is an older system and was at some risk of security breaches in the past. Steps were taken to address security issues on a temporary basis but the system still needs to be replaced. The agency is currently working on a business case and other initial project management needs but is not at the point to ask for full funding for the project. This package provides \$800,000 General Fund as a "down payment" until February 2015. At that time OSAC can return to request any further funding if necessary after following the necessary project management requirements below:
 - Work closely with and regularly report project status to the Office of the State Chief Information Officer (CIO) and the Legislative Fiscal Officer (LFO) throughout the project's lifecycle.
 - Follow the joint CIO and LFO Stage Gate Review Process.
 - Retain, hire, appoint or contract for qualified project management services who have experience in planning and managing projects of this type, scope and magnitude.
 - Update the business case and other foundational project management documents as required by the CIO.
 - Work with the CIO to contract with an independent quality management consultant to conduct an initial risk assessment, perform quality control reviews of foundational project documents as appropriate, and perform ongoing, independent quality management services as directed by the CIO.
 - Submit the updated business case, project management documents, initial risk assessment and quality control reviews to the CIO and LFO for Stage Gate Review.
 - Report back to the Legislature on project status during the 2016 Legislative Session and/or to other legislative committees as required.
 - Request legislative approval to proceed with the project prior to initiating project execution activities.
 - Utilize the CIO's Enterprise Project and Portfolio Management System as it is deployed for all project review, approval, and project status and Quality Assurance reporting activities throughout the life of the project.

- Approved Package 804 that reclassifies seven positions based on review by the DAS Chief Human Resources Office. The following positions are reclassified: an Office Specialist 2 to an Administrative Specialist 1; a Program Analyst 3 to an Operations and Policy Analyst 3; a Program Analyst 2 to a Program Analyst 3; an Accounting Technician 2 to an Accounting Technician 3; an Information Systems Specialist 5 to an Information Systems Specialist 7; and two Information Systems Specialist 4 to Information Specialist 7. The reclassifications reflect the work currently being done by the positions. The total cost is \$22,864 General Fund and \$28,081 Other Funds. This package provides the Other Funds limitation increase but the agency will have to identify the General Fund resources within its budget.

OSAC Other Programs

This unit includes the following programs: Chafee Education and Training Voucher Program, the Gear-Up Scholarship program, the Nursing Faculty Loan Repayment Program, JOBS Plus, Oregon Youth Conservation Corps Scholarships, Barber and Hairdresser Scholarships, and the Oregon Student Child Care Grant program. In addition, OSAC manages nearly 500 private scholarship programs through a common application process.

The Subcommittee approved a budget of \$948,619 General Fund and \$15,478,187 total funds. General Fund is increased by 3.1 percent above the 2013-15 Legislatively Approved Budget while total funds are reduced by 14.8 percent due to reduced funding for private scholarships. No FTE are included in this unit. The Subcommittee approved Package 100 that transfers the budget for this program unit from OSAC to HECC. The transfer includes the 2015-17 current service level for the program unit.

Opportunity Grants

This budget unit includes the funding for the Oregon Opportunity Grant which is the primary financial aid program for post-secondary students in Oregon. Grants are made to Oregon applicants who are attending community colleges, public universities, and private colleges/universities.

The Subcommittee approved a budget of \$127,833,621 General Fund, \$11,816,379 Lottery Funds, and \$140,913,213 total funds, which is 15.0 percent, 364.1 percent, and 23.7 percent above the 2013-15 Legislatively Approved Budget, respectively. No FTE are included in this unit. The Subcommittee took the following action:

- Approved Package 100 that transfers the budget for this program unit from OSAC to HECC. The transfer includes the 2015-17 current service level for the program unit.
- Approved Package 131 that increases the Oregon Opportunity Grant to \$139.7 million General Fund and Lottery Funds. This \$22.5 million increase is a 19.2 percent increase above current service level. This amount represents a 22.8 percent increase over the amount available in 2013-15. At this level of funding, it is estimated that the average grant will be \$1,680 and almost 84,000 recipients will be served.

ASPIRE

ASPIRE (Access to Student Assistance Programs In Reach of Everyone) helps middle and high school students access education and training beyond high school. Students receive information about college and career options, admission, and financial aid from trained volunteer mentors

who work with them one-on-one throughout the year. Beginning with four pilot schools in 1998, ASPIRE is currently serves 145 sites throughout the state.

The Subcommittee approved a budget of \$1,652,164 General Fund, \$2,506,539 total funds and 7.14 FTE, which are 4.6 percent, 41.8 percent, and 19.0 percent above the 2013-15 Legislatively Approved Budget, respectively. The increase is primarily due to a one-time federal grant allowing the agency to increase ASPIRE sites during the second year of the biennium. The Subcommittee took the following action:

- Approved Package 100 that transfers the budget for this program unit from OSAC to HECC. The transfer includes the 2015-17 current service level for the program unit.
- Approved Package 212 that provides one-time Federal Funds resources of \$661,488 to increase the number of ASPIRE sites by 112 during the second year of the biennium. The funds are available under the College Challenge Access Grant program. If the state provides the minimum funding for post-secondary education in the 2015-16 school year the funds become available in October 2016. The funds provide for partnership grants for each site, necessary licenses for the site, resources for equipment and evaluation, and three positions (1.14 FTE). The positions work with ASPIRE site coordinators, provide training, assist in making site plans for recruitment of limited duration volunteers and students, and manage or oversee sub-granting organizations.

Summary of Performance Measure Action

See attached Legislatively Adopted 2015-17 Key Performance Measures form.

DETAIL OF JOINT COMMITTEE ON WAYS AND MEANS ACTION

HB 5024-A

Higher Education Coordinating Commission
 Bill McGee 503-378-2078

DESCRIPTION	GENERAL FUND	LOTTERY FUNDS	OTHER FUNDS		FEDERAL FUNDS		TOTAL ALL FUNDS	POS	FTE
			LIMITED	NONLIMITED	LIMITED	NONLIMITED			
2013-15 Legislatively Approved Budget at Dec 2014 *	\$ 3,603,360	\$ -	\$ 1,757,474	\$ 200,000	\$ 347,571	\$ -	\$ 5,908,405	27	20.65
2015-17 Current Service Level (CSL)*	\$ 531,190,359	\$ 10,694,235	\$ 8,721,386	\$ 206,000	\$ 111,219,540	\$ 18,968,832	\$ 681,000,352	79	76.94
<u>SUBCOMMITTEE ADJUSTMENTS (from CSL)</u>									
SCR 001 HECC Operations									
Package 231: ETIC Reconfiguration									
Special Payments: Other Special Payments	\$ (19,744,404)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ (19,744,404)		
Package 301: HECC Management Streamlining									
Personal Services	\$ 1,214,318	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,214,318	8	8.00
Services and Supplies	\$ 71,344	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 71,344		
Package 303: Integrated research and data team									
Personal Services	\$ 1,059,333	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,059,333	5	5.00
Services and Supplies	\$ 340,667	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 340,667		
Package 304: Post-Secondary Education Memberships									
Services and Supplies	\$ 381,317	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 381,317		
Package 802: Information Systems									
Services and Supplies	\$ 290,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 290,000		
Package 804: Position Clean Up									
Personal Services	\$ (99,494)	\$ -	\$ 49,747	\$ -	\$ 49,747	\$ -	\$ -	0	0.00
Package 808: Technical Adjustments									
Services and Supplies	\$ -	\$ -	\$ 74,000	\$ -	\$ -	\$ -	\$ 74,000		
SCR 002 Degree Authorization/Private Career Schools									
Package 301: HECC Management Streamlining									
Services and Supplies	\$ -	\$ -	\$ (61,517)	\$ -	\$ (13,891)	\$ -	\$ (75,408)		
Package 302: DA/PCS Integrating Program approval & reviews									
Personal Services	\$ -	\$ -	\$ 276,892	\$ -	\$ -	\$ -	\$ 276,892	1	1.00
Services and Supplies	\$ -	\$ -	\$ 173,461	\$ -	\$ -	\$ -	\$ 173,461		
SCR 011 CCWD Operations									
Package 301: HECC Management Streamlining									
Services and Supplies	\$ (73,958)	\$ -	\$ (30,453)	\$ -	\$ (113,112)	\$ -	\$ (217,523)		
Package 311: CCWD Work Reconciliation									
Personal Services	\$ 963,679	\$ -	\$ (54,431)	\$ -	\$ (909,248)	\$ -	\$ -	0	0.00

DESCRIPTION	GENERAL FUND	LOTTERY FUNDS	OTHER FUNDS		FEDERAL FUNDS		TOTAL ALL FUNDS	POS	FTE
			LIMITED	NONLIMITED	LIMITED	NONLIMITED			
Package 801: LFO Analyst Adjustment									
Personal Services	\$ 309,024	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 309,024	2	2.00
Services and Supplies	\$ 35,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 35,000		
Special Payments	\$ 1,655,976	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,655,976		
Package 804: Position Clean Up									
Personal Services	\$ (146,470)	\$ -	\$ -	\$ -	\$ 146,470	\$ -	\$ -	0	0.00
SCR 012 State Support to Community Colleges									
Package 111: Community College Support Fund									
Special Payments: Dist to Comm Colleges	\$ 94,994,262	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 94,994,262		
Package 803: Skills Centers									
Special Payments: Dist to Comm Colleges	\$ 302,820	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 302,820		
Special Payments: Dist to School Districts	\$ 302,820	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 302,820		
SCR 015 CCWD Debt Service									
Package 811: Updated Base Debt Service Adjustment									
Debt Service: Principal & Interest	\$ (13,778,576)	\$ (232,169)	\$ -	\$ -	\$ -	\$ -	\$ (14,010,745)		
SCR 021 Public University Support Fund									
Package 100: Transfer from HECC									
Special Payments: Other Special Payments	\$ 513,609,162	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 513,609,162		
Package 102: Public University Support Fund									
Special Payments: Other Special Payments	\$ 151,390,838	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 151,390,838		
SCR 022 Agricultural Experiment Station									
Package 100: Transfer from HECC									
Special Payments: Other Special Payments	\$ 56,996,066	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 56,996,066		
Package 805: Public Universities Statewide Adjustments									
Special Payments: Other Special Payments	\$ 6,125,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 6,125,000		
SCR 023 Extension Service									
Package 100: Transfer from HECC									
Special Payments: Other Special Payments	\$ 41,226,540	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 41,226,540		
Package 805: Public Universities Statewide Adjustments									
Special Payments: Other Special Payments	\$ 4,375,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 4,375,000		
SCR 024 Forest Research Lab									
Package 100: Transfer from HECC									
Special Payments: Other Special Payments	\$ 6,271,107	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 6,271,107		
Package 805: Public Universities Statewide Adjustments									
Special Payments: Other Special Payments	\$ 3,500,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 3,500,000		

DESCRIPTION	GENERAL FUND	LOTTERY FUNDS	OTHER FUNDS		FEDERAL FUNDS		TOTAL ALL FUNDS	POS	FTE
			LIMITED	NONLIMITED	LIMITED	NONLIMITED			
SCR 025 Public University State Programs									
Package 100: Transfer from HECC									
Special Payments: Other Special Payments	\$ 10,596,516	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 10,596,516		
Package 801: LFO Analyst Adjustment									
Special Payments: Other Special Payments	\$ (749,065)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ (749,065)		
Package 806: ETIC Funding									
Special Payments: Other Special Payments	\$ 24,451,274	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 24,451,274		
SCR 026 Public University Debt Service									
Package 100: Transfer to HECC									
Services and Supplies	\$ 180,217	\$ 70,438	\$ -	\$ -	\$ -	\$ -	\$ 250,655		
Special Payments: Loans Repaid to State Agencies	\$ 13,776,092	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 13,776,092		
Debt Service	\$ 115,919,380	\$ 32,086,933	\$ -	\$ -	\$ -	\$ -	\$ 148,006,313		
Package 811: Updated Base Debt Service Adjustment									
Services and Supplies	\$ 36,556	\$ (70,438)	\$ -	\$ -	\$ -	\$ -	\$ (33,882)		
Special Payments: Loans Repaid to State Agencies	\$ (274,447)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ (274,447)		
Debt Service	\$ (9,932,859)	\$ (199,223)	\$ -	\$ 224,585,215	\$ -	\$ -	\$ 214,453,134	1	
SCR 027 Sports Action Lottery									
Package 100: Transfer to HECC									
Special Payments: Other Special Payments	\$ -	\$ 11,397,647	\$ -	\$ -	\$ -	\$ -	\$ 11,397,647		
Package 807: Sports Action Lottery Adjustments									
Special Payments: Other Special Payments	\$ -	\$ (3,157,647)	\$ -	\$ -	\$ -	\$ -	\$ (3,157,647)		
SCR 031 OHSU									
Package 100: Transfer to HECC									
Special Payments: Other Special Payments	\$ 77,332,846	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 77,332,846		
SCR 041 OSAC Office Operations									
Package 070: Revenue Shortfalls									
Personal Services	\$ -	\$ -	\$ (504,041)	\$ -	\$ -	\$ -	\$ (504,041)	0	-3.67
Services and Supplies	\$ -	\$ -	\$ (6,444)	\$ -	\$ -	\$ -	\$ (6,444)		
Package 100: Transfer to HECC									
Personal Services	\$ 1,698,032	\$ -	\$ 1,951,795	\$ -	\$ -	\$ -	\$ 3,649,827	20	19.67
Services and Supplies	\$ 278,402	\$ -	\$ 666,071	\$ -	\$ -	\$ -	\$ 944,473		
Package 131: OSAC Opportunity Grant Expansion									
Services and Supplies	\$ 250,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 250,000		

DESCRIPTION	GENERAL FUND	LOTTERY FUNDS	OTHER FUNDS		FEDERAL FUNDS		TOTAL ALL FUNDS	POS	FTE
			LIMITED	NONLIMITED	LIMITED	NONLIMITED			
Package 213: OSAC Student Outreach									
Personal Services	\$ -	\$ -	\$ -	\$ -	\$ 77,108	\$ -	\$ 77,108	4	0.77
Services and Supplies	\$ -	\$ -	\$ -	\$ -	\$ 54,850	\$ -	\$ 54,850		
Special Payments: Dist to Non-Profit Orgs	\$ -	\$ -	\$ -	\$ -	\$ 600,000	\$ -	\$ 600,000		
Package 214: OSAC Scholarship Restoration									
Personal Services	\$ 300,687	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 300,687	0	2.00
Services and Supplies	\$ -	\$ -	\$ (30,000)	\$ -	\$ -	\$ -	\$ (30,000)		
Package 301: HECC Management Streamlining									
Services and Supplies	\$ (44,310)	\$ -	\$ (54,156)	\$ -	\$ -	\$ -	\$ (98,466)		
Package 313: OSAC IT Needs									
Services and Supplies	\$ 800,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 800,000		
Package 804: Positon Clean Up									
Personal Services	\$ -	\$ -	\$ 28,081	\$ -	\$ -	\$ -	\$ 28,081	0	0.00
SCR 042 OSAC Other Programs									
Package 100: Transfer to HECC									
Special Payments: Dist to Individuals	\$ 948,619	\$ -	\$ 14,529,568	\$ -	\$ -	\$ -	\$ 15,478,187		
SCR 043 Opportunity Grants									
Package 100: Transfer to HECC									
Special Payments: Dist to Individuals	\$ 113,389,821	\$ 3,775,731	\$ 163,213	\$ -	\$ -	\$ -	\$ 117,328,765		
Package 131: Opportunity Grant Expansion									
Special Payments: Dist to Individuals	\$ 14,493,800	\$ 8,040,648	\$ 1,050,000	\$ -	\$ -	\$ -	\$ 23,584,448		
SCR: 044: ASPIRE									
Package 100: Transfer to HECC									
Personal Services	\$ 1,064,725	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,064,725	8	6.00
Services and Supplies	\$ 72,645	\$ -	\$ 117,800	\$ -	\$ -	\$ -	\$ 190,445		
Special Payments: Local School Districts	\$ 514,794	\$ -	\$ 75,087	\$ -	\$ -	\$ -	\$ 589,881		
Package 212: ASPIRE Expansion									
Personal Services	\$ -	\$ -	\$ -	\$ -	\$ 101,303	\$ -	\$ 101,303	3	1.14
Services and Supplies	\$ -	\$ -	\$ -	\$ -	\$ 23,185	\$ -	\$ 23,185		
Special Payments: Local School Districts	\$ -	\$ -	\$ -	\$ -	\$ 537,000	\$ -	\$ 537,000		
TOTAL ADJUSTMENTS	\$ 1,216,675,096	\$ 51,711,920	\$ 18,414,673	\$ 224,585,215	\$ 553,412	\$ 1	\$ 1,511,940,317	51	41.91
SUBCOMMITTEE RECOMMENDATION *	\$ 1,747,865,455	\$ 62,406,155	\$ 27,136,059	\$ 224,791,215	\$ 111,772,952	\$ 18,968,833	\$ 2,192,940,669	130	118.85
% Change from 2013-15 Leg Approved Budget	48406.5%	0.0%	1444.0%	112295.6%	32058.3%	0.0%	37015.6%		
% Change from 2015-17 Current Service Level	229.0%	483.5%	211.1%	109021.9%	0.5%	0.0%	222.0%		

*Excludes Capital Construction Expenditures

Legislatively Approved 2015-2017 Key Performance Measures

Agency: Higher Education Coordinating Commission

Mission: The Higher Education Coordinating Commission seeks to: Broaden pathways to the goal of educational success beyond high school by achieving at least 40% of adult Oregonians earning a bachelor’s degree or higher and at least 40% of adult Oregonians earning an associate’s degree or post-secondary credential as their highest level of educational attainment by 2025 (see ORS 351.009 Mission of Education Beyond High School); make the pathways accessible, affordable and supportive for students; steer the higher education enterprise and cheer the promotion of college completion and career readiness.

Legislatively Proposed KPMs	Customer Service Category	Agency Request	Most Current Result	Target 2016	Target 2017
1 - Oregon High School Graduates Attending College - Percentage of Oregon students enrolled in college within 16 months of their 4-year high school cohort graduation date.		Approved KPM		66.00	66.00
2 - College Credits Earned by K-12 Students - Amount of postsecondary credit per graduate awarded to K-12 students.		Approved KPM			
3 - Number of adult high school diplomas/GEDs earned - Number of people earning GEDs and adult high school diplomas in Oregon each year.		Approved KPM			
4 a - Developmental education pass rates - Percent of students enrolled in a developmental education math or writing course below the 100 level who successfully complete the course: Writing.		Approved KPM		69.00	69.00
4 b - Developmental education pass rates - Percent of students enrolled in a developmental education math or writing course below the 100 level who successfully complete the course: Math		Approved KPM		63.00	63.00
5 a - Success of developmental education students in college math and English - Percent of students enrolled in at least 6 credits who successfully complete college-level math or writing course within 24 months of enrolling in a corresponding community college math or writing developmental education course compared to the number of students enrolled in developmental education generally: Math.		Approved KPM		23.00	23.00

Agency: Higher Education Coordinating Commission

Mission: The Higher Education Coordinating Commission seeks to: Broaden pathways to the goal of educational success beyond high school by achieving at least 40% of adult Oregonians earning a bachelor’s degree or higher and at least 40% of adult Oregonians earning an associate’s degree or post-secondary credential as their highest level of educational attainment by 2025 (see ORS 351.009 Mission of Education Beyond High School); make the pathways accessible, affordable and supportive for students; steer the higher education enterprise and cheer the promotion of college completion and career readiness.

Legislatively Proposed KPMs	Customer Service Category	Agency Request	Most Current Result	Target 2016	Target 2017
5 b - Success of developmental education students in college math and English - Percent of students enrolled in at least 6 credits who successfully complete college-level math or writing course within 24 months of enrolling in a corresponding community college math or writing developmental education course compared to the number of students enrolled in developmental education generally: Writing.		Approved KPM		44.00	44.00
6 - Number of community college students who have earned 15-29 college credits.		Approved KPM		38,000.00	38,000.00
7 - Number of community college students who have earned 30-44 college credits.		Approved KPM		24,500.00	24,500.00
8 - Number of community college students who earn at least 45 college credits.		Approved KPM		5,850.00	5,850.00
9 - Certificate and OTM Earners - Number of certificates awarded and Oregon Transfer Modules (OTM) earned each academic year.		Approved KPM		8,650.00	8,650.00
10 - Associate's Degrees - Number of associate’s degrees completed each academic year.		Approved KPM		12,000.00	12,000.00
11 - Completion Ratio - Number of degrees, certificates completed, and transfer prior to completion per 100 credit-bearing FTE		Approved KPM		38.00	38.00
12 - Community college to university transfers - Number of students who transfer to any four-year institution each academic year.		Approved KPM		26,750.00	26,750.00
13 a - Earnings of community college completers - Median earnings of community college completers four quarters and five years after completion: 4 quarters.		Approved KPM		20,200.00	20,200.00

Agency: Higher Education Coordinating Commission

Mission: The Higher Education Coordinating Commission seeks to: Broaden pathways to the goal of educational success beyond high school by achieving at least 40% of adult Oregonians earning a bachelor’s degree or higher and at least 40% of adult Oregonians earning an associate’s degree or post-secondary credential as their highest level of educational attainment by 2025 (see ORS 351.009 Mission of Education Beyond High School); make the pathways accessible, affordable and supportive for students; steer the higher education enterprise and cheer the promotion of college completion and career readiness.

Legislatively Proposed KPMs	Customer Service Category	Agency Request	Most Current Result	Target 2016	Target 2017
13 b - Earnings of community college completers - Median earnings of community college completers four quarters and five years after completion: 5 Years.		Approved KPM		36,000.00	36,000.00
14 a - Earnings of community college leavers - Median earnings of community college students who left but earned at least 12 credits: 4 Quarters.		Approved KPM			
14 b - Earnings of community college leavers - Median earnings of community college students who left but earned at least 12 credits: 5 Years		Approved KPM			
15 - First-year retention rate - Percentage of Oregon public university students starting in a fall term and returning to an Oregon public university the following fall.		Approved KPM		83.00	83.00
16 - Six-year public university graduation rate - Percentage of full-time first-time students in an entering cohort that had graduate from an Oregon public university six years later.		Approved KPM		60.50	60.50
17 - Number of bachelor’s degrees awarded each academic year - Number of bachelor's degrees awarded at Oregon public universities each academic year		Approved KPM		16,850.00	16,850.00
18 - Number of advanced degrees and graduate certificates awarded - Number of advanced degrees and graduate certificates awarded at Oregon public universities each academic year.		Approved KPM		4,560.00	4,560.00
19 - Bachelor's degrees awarded to community college transfers - Number of bachelor’s degrees awarded to transfer students from Oregon community colleges each academic year		Approved KPM		4,400.00	4,400.00

Agency: Higher Education Coordinating Commission

Mission: The Higher Education Coordinating Commission seeks to: Broaden pathways to the goal of educational success beyond high school by achieving at least 40% of adult Oregonians earning a bachelor’s degree or higher and at least 40% of adult Oregonians earning an associate’s degree or post-secondary credential as their highest level of educational attainment by 2025 (see ORS 351.009 Mission of Education Beyond High School); make the pathways accessible, affordable and supportive for students; steer the higher education enterprise and cheer the promotion of college completion and career readiness.

Legislatively Proposed KPMs	Customer Service Category	Agency Request	Most Current Result	Target 2016	Target 2017
20 - Graduation rate for non-traditional students - Graduation rate for newly admitted undergraduate students who are not first-time full-time freshman students (within six years of enrollment).		Approved KPM		63.00	63.00
21 a - Earnings of bachelor's degree completers - Median earnings of graduating students (BA/BS only) four quarters and five years after graduation: 4 Quarters.		Approved KPM		13,350.00	13,350.00
21 b - Earnings of bachelor's degree completers - Median earnings of graduating students (BA/BS only) four quarters and five years after graduation: 5 Years.		Approved KPM		32,600.00	32,600.00
22 - Percentage of resident enrolled students who are incurring unaffordable costs.		Approved KPM			
23 - Percentage of resident enrolled students who are incurring unaffordable costs adjusted with institutional aid.		Approved KPM			
24 a - University graduate debt - Average debt amount of Bachelor’s graduates accompanied by percent of graduates who are borrowers: Debt Amount.		Approved KPM		24,700.00	24,700.00
24 b - University graduate debt - Average debt amount of Bachelor’s graduates accompanied by percent of graduates who are borrowers: Percentage of Students with Debt.		Approved KPM			
25 a - Student loan default rates - Three-year official cohort student loan default rates: Public Universities		Approved KPM		6.40	6.40
25 b - Student loan default rates - Three-year official cohort student loan default rates: Public Community Colleges.		Approved KPM		22.90	22.90
25 c - Student loan default rates - Three-year official cohort student loan default rates: Higher Education Institutions		Approved KPM		14.30	14.30

Legislatively Proposed KPMs	Customer Service Category	Agency Request	Most Current Result	Target 2016	Target 2017
26 - Average cost of attendance - Average cost of attendance for resident undergraduates minus grant aid as a percentage of median income.		Approved KPM		27.50	27.50
27 - Tuition and fees - Average statewide tuition and fees minus grant aid and net assess tuition and fees per resident, undergraduate FTE (colleges and universities).		Approved KPM			
28 - CUSTOMER SERVICE - Percent of customers rating their satisfaction with the agency's customer service as "good" or "excellent": overall, timeliness, accuracy, helpfulness, expertise, availability of information.		Approved KPM			
28 - CUSTOMER SERVICE - Percent of customers rating their satisfaction with the agency's customer service as "good" or "excellent": overall, timeliness, accuracy, helpfulness, expertise, availability of information.	Accuracy	Approved KPM		90.00	90.00
28 - CUSTOMER SERVICE - Percent of customers rating their satisfaction with the agency's customer service as "good" or "excellent": overall, timeliness, accuracy, helpfulness, expertise, availability of information.	Availability of Information	Approved KPM		90.00	90.00
28 - CUSTOMER SERVICE - Percent of customers rating their satisfaction with the agency's customer service as "good" or "excellent": overall, timeliness, accuracy, helpfulness, expertise, availability of information.	Expertise	Approved KPM		90.00	90.00
28 - CUSTOMER SERVICE - Percent of customers rating their satisfaction with the agency's customer service as "good" or "excellent": overall, timeliness, accuracy, helpfulness, expertise, availability of information.	Helpfulness	Approved KPM		90.00	90.00

Legislatively Proposed KPMs	Customer Service Category	Agency Request	Most Current Result	Target 2016	Target 2017
28 - CUSTOMER SERVICE - Percent of customers rating their satisfaction with the agency's customer service as "good" or "excellent": overall, timeliness, accuracy, helpfulness, expertise, availability of information.	Overall	Approved KPM		90.00	90.00
28 - CUSTOMER SERVICE - Percent of customers rating their satisfaction with the agency's customer service as "good" or "excellent": overall, timeliness, accuracy, helpfulness, expertise, availability of information.	Timeliness	Approved KPM		90.00	90.00
29 - BEST PRACTICES - Percent of total best practices met by the Commission.		Approved KPM			

LFO Recommendation:

All of the KPMs are listed as "Proposed New KPM" but some of them are similar to KPMs that were under one of the component agencies that were folded into HECC including the Department of Community Colleges and Workforce Development, Oregon Student Access Commission, and the Oregon University System. HECC is proposing 43 different KPMs or subset KPMs including the multiple customer service KPMs. A number of the measures do not have targets at this time since the data for measuring the KPM is still being developed or baseline data is lacking. These include Measures 2, 3, 14a, 14b, 21a, 21b, 24b, and 27. Since this HECC's first set of independent KPMs it is preliminary to judge the performance of the agency against progress on their KPMs. Many of them are tied or measure similar trends that the funding formulas for Public Universities and Community Colleges that HECC is discussing to include in their performance or completion based distribution formulas. LFO recommends that the KPMs and their initial targets be accepted. Many of the targets may change in future biennia as better baseline data for many of the KPMs are developed or collected.

Sub-Committee Action:

Accept the LFO recommendation.

BUDGET REPORT AND MEASURE SUMMARY

CARRIER: Rep. Buckley

Joint Committee On Ways and Means

Action: Do Pass.

Action Date: 07/03/15

Vote:

House

Yeas: 11 - Buckley, Gomberg, Huffman, Komp, McLane, Nathanson, Rayfield, Read, Smith, Whitsett, Williamson

Exc: 1 - Whisnant

Senate

Yeas: 12 - Burdick, Devlin, Girod, Hansell, Johnson, Monroe, Roblan, Shields, Steiner Hayward, Thomsen, Whitsett, Winters

Prepared By: Linda Ames and Linda Gilbert, Legislative Fiscal Office

Reviewed By: Ken Rocco, Legislative Fiscal Office

Agency: Emergency Board

Biennium: 2015-17

Agencies: Various

Biennium: 2013-15

Budget Summary*

	<u>2013-15 Legislatively Approved Budget</u>	<u>2015-17 Legislatively Adopted Budget</u>	<u>2015-17 Committee Recommendation</u>	<u>Committee Change</u>
<u>Emergency Board</u>				
General Fund - General Purpose	-	-	\$ 30,000,000	\$ 30,000,000
General Fund - Special Purpose Appropriations				
State employee compensation changes	-	-	\$ 120,000,000	\$ 120,000,000
Compensation changes for non-state employees	-	-	\$ 10,700,000	\$ 10,700,000
Oregon Health Authority/Department of Human Services caseload or other costs	-	-	\$ 40,000,000	\$ 40,000,000
Education - early learning through post-secondary	-	-	\$ 3,000,000	\$ 3,000,000
Department of Administrative Services - Enterprise Technology rate	-	-	\$ 6,500,000	\$ 6,500,000
Department of Justice - Defense of Criminal Convictions	-	-	\$ 2,000,000	\$ 2,000,000
Department of Human Services for provider audits 100,000		-	\$ 100,000	\$
<u>Various Agencies - Omnibus Adjustments</u>				
General Fund	-	-	\$ (27,929,624)	\$ (27,929,624)
General Fund Debt Service	-	-	\$ (2,018,162)	\$ (2,018,162)
Lottery Funds	-	-	\$ (725,589)	\$ (725,589)
Other Funds	-	-	\$ (28,658,678)	\$ (28,658,678)
Federal Funds	-	-	\$ (11,062,641)	\$ (11,062,641)
<u>ADMINISTRATION PROGRAM AREA</u>				
<u>Department of Administrative Services</u>				
General Fund	-	-	\$ 2,540,000	\$ 2,540,000
Other Funds	-	-	\$ 16,800,847	\$ 16,800,847
Other Funds Nonlimited	-	-	\$ 145,875,000	\$ 145,875,000

<u>Budget Summary*</u>	<u>2013-15 Legislatively Approved Budget</u>	<u>2015-17 Legislatively Adopted Budget</u>	<u>2015-17 Committee Recommendation</u>	<u>Committee Change</u>
<u>Office of the Governor</u>				
Lottery Funds	-	-	\$ 500,000	\$ 500,000
	-	-	\$ 1,332,517	\$ 1,332,517
<u>Public Employees Retirement System</u>				
Other Funds	-	-	\$ 509,960	\$ 509,960
<u>Department of Revenue</u>				
General Fund	-	-	\$ 3,935,414	\$ 3,935,414
General Fund Debt Service			\$ 3,756,256	\$ 3,756,256
Other Funds	-	-	\$ 28,264,440	\$ 28,264,440
<u>ECONOMIC AND COMMUNITY DEVELOPMENT PROGRAM</u>				
<u>AREA</u>				
<u>Oregon Business Development Department</u>				
General Fund Debt Service	-	-	\$ 4,089,357	\$ 4,089,357
Lottery Funds	-	-	\$ 1,500,000	\$ 1,500,000
Other Funds	-	-	\$ 227,178,216	\$ 227,178,216
Other Funds Nonlimited	-	-	\$ 25,000,000	\$ 25,000,000
<u>Housing and Community Services Department</u>				
Other Funds	-	-	\$ 33,444,789	\$ 33,444,789
<u>Department of Veterans' Affairs</u>				
General Fund	-	-	\$ 500,000	\$ 500,000
<u>EDUCATION PROGRAM AREA</u>				
<u>Department of Education</u>				
General Fund	-	-	\$ 56,490,543	\$ 56,490,543
Lottery Funds	-	-	\$ 66,009,457	\$ 66,009,457
Other Funds	-	-	\$ 126,210,000	\$ 126,210,000

Budget Summary***Higher Education Coordinating Commission**

	<u>2013-15 Legislatively Approved Budget</u>	<u>2015-17 Legislatively Adopted Budget</u>	<u>2015-17 Committee Recommendation</u>	<u>Committee Change</u>
General Fund	-	-	\$ 5,062,300	\$ 5,062,300
Other Funds	-	-	\$ 6,019,882	\$ 6,019,882
Other Funds Nonlimited	-	-	\$ 50,648,642	\$ 50,648,642

Oregon Health & Science University

General Fund Debt Service	-	-	\$ 8,522,485	\$ 8,522,485
Other Funds Debt Service	-	-	\$ 38,648,268	\$ 38,648,268
Other Funds	-	-	\$ 200,076,038	\$ 200,076,038

HUMAN SERVICES PROGRAM AREA**Department of Human Services**

General Fund	-	-	\$ 5,437,494	\$ 5,437,494
General Fund Debt Service	-	-	\$ 839,543	\$ 839,543
Other Funds	-	-	\$ 3,355,000	\$ 3,355,000
Federal Funds	-	-	\$ 160,000	\$ 160,000

Oregon Health Authority

General Fund	-	-	\$ 11,060,000	\$ 11,060,000
Other Funds	-	-	\$ 137,152	\$ 137,152

Long Term Care Ombudsman

General Fund	-	-	\$ 100,000	\$ 100,000
--------------	---	---	------------	------------

JUDICIAL BRANCH**Judicial Department**

General Fund	-	-	\$ 700,000	\$ 700,000
Other Funds	-	-	\$ 40,255,000	\$ 40,255,000

Budget Summary***NATURAL RESOURCES PROGRAM AREA****Department of Agriculture**

	2013-15 Legislatively Approved Budget	2015-17 Legislatively Adopted Budget	2015-17 Committee Recommendation	Committee Change
General Fund	-	-	\$ 55,000	\$ 55,000
Other Funds	-	-	\$ 1,992,496	\$ 1,992,496

Department of Environmental Quality

General Fund	-	-	\$ 280,000	\$ 280,000
Other Funds	-	-	\$ 110,092	\$ 110,092

Department of Fish and Wildlife

General Fund	-	-	\$ 525,000	\$ 525,000
--------------	---	---	------------	------------

Oregon Department of Forestry

General Fund	-	-	\$ 809,377	\$ 809,377
--------------	---	---	------------	------------

Department of Land Conservation and Development

General Fund	-	-	\$ 494,000	\$ 494,000
--------------	---	---	------------	------------

Department of State Lands

Federal Funds	-	-	\$ 161,488	\$ 161,488
---------------	---	---	------------	------------

Parks and Recreation Department

Lottery Funds	-	-	\$ 2,190,640	\$ 2,190,640
Lottery Funds Debt Service	-	-	\$ (912,494)	\$ (912,494)
Other Funds	-	-	\$ 11,815,544	\$ 11,815,544
Federal Funds	-	-	\$ (899,575)	\$ (899,575)

Water Resources Department

Other Funds	-	-	\$ 51,960,889	\$ 51,960,889
Other Funds Debt Service	-	-	\$ 1,201,865	\$ 1,201,865

Budget Summary***Oregon Watershed Enhancement Board**

	2013-15 Legislatively Approved Budget	2015-17 Legislatively Adopted Budget	2015-17 Committee Recommendation	Committee Change
Federal Funds	-	-	\$ 200,000	\$ 200,000

PUBLIC SAFETY PROGRAM AREA**Department of Corrections**

Other Funds	-	-	\$ 254,568	\$ 254,568
-------------	---	---	------------	------------

Criminal Justice Commission

General Fund	-	-	\$ 5,000,000	\$ 5,000,000
--------------	---	---	--------------	--------------

Department of Justice

General Fund	-	-	\$ 240,550	\$ 240,550
General Fund Debt Service			\$ 2,407,587	\$ 2,407,587
Other Funds	-	-	\$ 15,415,000	\$ 15,415,000
Federal Funds	-	-	\$ 29,997,991	\$ 29,997,991

Military Department

General Fund	-	-	\$ 339,563	\$ 339,563
General Fund Debt Service	-	-	\$ 434,833	\$ 434,833
Other Funds	-	-	\$ 153,000	\$ 153,000
Federal Funds	-	-	\$ 358,253	\$ 358,253

Department of State Police

Lottery Funds	-	-	\$ 278,788	\$ 278,788
Other Funds	-	-	\$ 1,072,470	\$ 1,072,470
Federal Funds	-	-	\$ 1,163	\$ 1,163

Budget Summary*

	<u>2013-15 Legislatively Approved Budget</u>	<u>2015-17 Legislatively Adopted Budget</u>	<u>2015-17 Committee Recommendation</u>	<u>Committee Change</u>
<u>Oregon Youth Authority</u>				
General Fund Debt Service	-	-	\$ 3,115,428	\$ 3,115,428
Other Funds	-	-	\$ 1,055,565	\$ 1,055,565
Federal Funds Debt Service Nonlimited	-	-	\$ 1	\$ 1

TRANSPORTATION PROGRAM AREA

Department of Transportation

General Fund	-	-	\$ 130,000	\$ 130,000
Other Funds Debt Service	-	-	\$ 1,354,734	\$ 1,354,734
Other Funds	-	-	\$ 55,000,000	\$ 55,000,000

2015-17 Budget Summary

General Fund Total			\$ 299,716,944	\$ 299,716,944
Lottery Funds Total			\$ 69,673,319	\$ 69,673,319
Other Funds Limited Total			\$ 833,627,137	\$ 833,627,137
Other Funds Nonlimited Total			\$ 221,523,642	\$ 221,523,642
Federal Funds Limited Total			\$ 18,916,679	\$ 18,916,679
Federal Funds Nonlimited Total			\$ 1	\$ 1

* Excludes Capital Construction

2013-15 Supplemental Appropriations

Oregon Health Authority

Other Funds

-

\$ 45,000,000

\$ 45,000,000

Department of Land Conservation and Development

General Fund

-

\$ (194,000)

\$ (194,000)

<u>2013-15 Legislatively Approved Budget</u>	<u>2013-15 Committee Recommendation</u>	<u>Committee Change</u>
--	---	-------------------------

2015-17 Position Summary**Department of Administrative Services**

	<u>2013-15 Legislatively Approved Budget</u>	<u>2015-17 Legislatively Adopted Budget</u>	<u>2015-17 Committee Recommendation</u>	<u>Committee Change</u>
Authorized Positions	-	-	8	8
Full-Time Equivalent (FTE) positions	-	-	3.47	3.47

Office of the Governor

Authorized Positions	-	-	6	6
Full-Time Equivalent (FTE) positions	-	-	5.92	5.92

Department of Revenue

Authorized Positions	-	-	34	34
Full-Time Equivalent (FTE) positions	-	-	33.92	33.92

Oregon Health Authority

Authorized Positions	-	-	3	3
Full-Time Equivalent (FTE) positions	-	-	2.50	2.50

Department of Agriculture

Authorized Positions	-	-	6	6
Full-Time Equivalent (FTE) positions	-	-	5.76	5.76

Department of Environmental Quality

Authorized Positions	-	-	2	2
Full-Time Equivalent (FTE) positions	-	-	1.25	1.25

Oregon Department of Forestry

Authorized Positions	-	-	1	1
Full-Time Equivalent (FTE) positions	-	-	0.50	0.50

<u>2015-17 Position Summary</u>	2013-15 Legislatively Approved Budget	2015-17 Legislatively Adopted Budget	2015-17 Committee Recommendation	Committee Change
<u>Department of Land Conservation and Development</u>				
Authorized Positions	-	-	1	1
Full-Time Equivalent (FTE) positions	-	-	1.00	1.00
<u>Department of Justice</u>				
Authorized Positions	-	-	22	22
Full-Time Equivalent (FTE) positions	-	-	21.13	21.13
<u>Oregon Military Department</u>				
Authorized Positions	-	-	3	3
Full-Time Equivalent (FTE) positions	-	-	3.00	3.00
<u>Oregon State Police</u>				
Authorized Positions	-	-	-	-
Full-Time Equivalent (FTE) positions	-	-	(0.50)	(0.50)

Summary of Revenue Changes

The General Fund appropriations made in the bill are within resources available as projected in the May 2015 economic and revenue forecast by the Department of Administrative Services, Office of Economic Analysis, supplemented by transfers from various agency accounts to the General Fund for general governmental purposes as authorized in Senate Bill 501, plus other actions to reduce state agency expenditures.

Summary of Capital Construction Subcommittee Action

Senate Bill 5507 appropriates General Fund to the Emergency Board for general purpose and targeted special purpose appropriations, and makes other adjustments to individual agency budgets and position authority as described below.

Emergency Board

The Emergency Board allocates General Fund and provides Lottery Funds, Other Funds, and Federal Funds expenditure limitation to state agencies for unanticipated needs in approved agency budgets when the Legislature is not in session. The Subcommittee appropriated \$30 million General Fund to the Emergency Board for general purposes.

Senate Bill 5507 makes seven special purpose appropriations to the Emergency Board, totaling \$182.3 million General Fund:

- \$120 million General Fund for state employee compensation changes.
- \$40 million General Fund for the Oregon Health Authority or the Department of Human Services for caseload costs or other budget challenges that the agencies are unable to mitigate. Known potential challenges include costs associated with federal fair labor standards act rule changes affecting home care and personal support workers; these are estimated to be around \$17 million but will depend in part on pending litigation and programmatic changes. Another unknown element is the full impact of second fiscal year costs for nursing facility rates that may fluctuate based on bed reduction targets; \$4.9 million of rate inflation was originally set aside as part of the Governor's budget to stimulate a discussion on aligning nursing facility cost increases with Oregon Health Plan inflation rates.
- \$10.7 million General Fund for allocation to state agencies for compensation changes driven by collective bargaining for workers who are not state employees. Allocations related to child care, adult foster care, homecare, and personal support workers are anticipated.
- \$6.5 million General Fund for Department of Administrative Services to be allocated, if necessary, to fund changes in Department of Administrative Services Enterprise Technology Services (ETS) rates and assessments. A budget note in SB 5502, the budget bill for the Department of Administrative Services, required the State Chief Information Officer to recommend during the 2016 Regular Session a new funding formula for ETS that refocuses charges to state agencies on fees for service and deemphasizes the use of assessments, which fund all positions regardless of reductions in services delivered, demonstrate how reductions in services purchased by state agencies would be reflected in reductions in operating expenses, and include price list adjustments needed for implementation of a new revenue formula at the start of second year of the biennium.
- \$3 million General Fund for Education, early learning through post-secondary.
- \$2 million General Fund for Department of Justice, Defense of Criminal Convictions caseload costs.
- \$100,000 General Fund for Department of Human Services (DHS), to be used – if warranted – for completing provider audits, compliance work, or reporting activities. These potential actions are specifically tied to a budget note providing direction regarding wage increases for direct care workers serving people with intellectual and developmental disabilities. The budget note is included in the DHS section of this budget report.

If these special purpose appropriations are not allocated by the Emergency Board before December 1, 2016, any remaining funds become available to the Emergency Board for general purposes.

Adjustments to Approved 2015-17 Budgets

OMNIBUS ADJUSTMENTS

Omnibus adjustments reflect budget changes in multiple agencies based on reductions in Department of Administrative Services' assessments and charges for services, Audits Division assessments, Attorney General rates, and debt service. Total savings are \$30.1 million General Fund, \$0.7 million Lottery Funds, \$28.5 million Other Funds, and \$11.1 million Federal Funds.

ADMINISTRATION

Department of Administrative Services

The Subcommittee approved a one-time \$951,393 Other Funds expenditure limitation increase and establishment of six limited-duration positions (1.71 FTE) for the Chief Human Resources Office to review the Human Resource Information System project (HRIS). The positions will review and update the preparations in the current project for business processes realignment that will be necessary with the adoption and deployment of any new HR IT system, review and update existing IT modernization plans, and study and improve conversion planning for implementation of HRIS. The Department will report initial findings of this review to the appropriate subcommittees of the Joint Committee on Ways and Means during the 2016 legislative session.

The Subcommittee also approved a \$293,314 Other Funds expenditure limitation increase and the addition of two positions for Shared Financial Services to accommodate service provision for the Department of Geology and Mineral Industries, which will now have financial functions carried out by DAS.

The Subcommittee also approved continuing to give nonlimited authority to DAS to make Other Funds expenditures necessary to disburse general obligation bonds sold during the 2013-15 biennium for the benefit of public universities. Disbursement of future bond sales will be done by the Higher Education Coordinating Commission (HECC), but during the 2013-15 biennium, the Department of Administrative Services (DAS) was given initial authority to disburse these proceeds. As the bond project duties related to issuance of Article XI-F and XI-G general obligation bonds transition from DAS to HECC per House Bill 3199, both agencies were given nonlimited authority to disburse proceeds of bonds issued during 2013-15. The total amount of undisbursed proceeds as of June 30, 2015 from 2013-15 bond sales is \$196,523,642. The initial estimate of the amount of 2013-15 proceeds DAS will disburse in 2015-17 per agreements with public universities is \$145,875,000, with HECC assumed to disburse \$50,648,642. These amounts will likely change once the timing of final transition from DAS to HECC is known.

Senate Bill 5507 includes one-time General Fund appropriations to the Department of Administrative Services for the following purposes:

- \$1,100,000 for disbursement to the National Urban Housing and Economic Community Development Corporation (NUHECDC) for implementation of an affordable homes, skills training, and jobs for unemployed prior-offenders, at-risk youth, and veterans. NUHECDC is directed to provide written status reports to the Department of Administrative Services and the Legislative Fiscal Officer each quarter during the 2015-17 biennium to document progress in meeting the program's objectives of providing affordable housing for low to

moderate income Oregonians; skill training for prior-offenders, at-risk youth, and veterans; and job placement for those with barriers to quality employment.

- \$850,000 for disbursement to the Pine Valley Fire District for a new location and facility to house the Fire Department in the City of Halfway, Oregon.
- \$100,000 for disbursement to the City of Medford to pay for the completion of a feasibility study on development of a conference center in the Medford area. This project could grow beyond a simple conference center and, if feasible, could include sports and recreation components.
- \$90,000 for disbursement to the City of Gold Hill for engineering work needed to construct the Gold Hill Whitewater Park at Ti'lomikh Falls on the Rogue River. The Whitewater Park is being built into the new Gold Hills Parks Master Plan. The goal of the project is to turn Gold Hill into a whitewater destination. The engineering of the whitewater project will be completed in 2015. Permitting and fundraising for construction is expected to take two years. Construction of the whitewater features is expected to take two months. The goal is to finish the park before the 2016 Olympics and to have a local paddler trained at the site competing in the 2020 Olympics.

The Subcommittee added \$15,556,140 Other Funds expenditure limitation for one-time cost of issuance and special payments associated with the disbursement of proceeds from Lottery Bond sales; projects are detailed below and approved in House Bill 5030. Cost of issuance for these projects totals \$456,140. There is no debt service allocated in the 2015-17 biennium, as the bonds will not be sold until the Spring of 2017. Total debt service on all the projects described below is estimated at a total of \$2,919,215 Lottery Funds for the 2017-19 biennium.

- \$750,000 Other Funds for disbursement to Concordia University for the construction of the Faubion prekindergarten through grade eight school.
- \$1,250,000 Other Funds for disbursement to the Elgin Health District for a rural health care clinic.
- \$1,000,000 Other Funds for disbursement to Open Meadow for the construction of a new facility for the Open School in Portland.
- \$1,000,000 Other Funds for disbursement to the Boys and Girls Clubs of Portland Metropolitan Area for a new Boys and Girls Club in Rockwood.
- \$500,000 Other Funds for disbursement to the City of Grants Pass for the Riverside Park renovation project.
- \$1,000,000 Other Funds for disbursement to the Mountain West Career Technical Institute for the Career Technical Education Center in Salem.
- \$2,000,000 Other Funds for disbursement to Wheeler County for the construction of an underground fiber optic telecommunication line from Condon to Fossil.
- \$1,500,000 Other Funds for disbursement to the Port of Umatilla for facilities development at the Eastern Oregon Trade and Event Center in Hermiston.
- \$3,000,000 Other Funds for disbursement to Trillium Family Services for improving and expanding the Children's Farm Home near Corvallis which houses the Secure Adolescent Inpatient Program.
- \$1,600,000 Other Funds for disbursement to the Port of Morrow for development of an Early Childhood Development Center at the workforce training center at the Port of Morrow.

- \$1,500,000 Other Funds for disbursement to the City of Tigard for the Hunziker Development Project.

Senate Bill 5507 includes a one-time \$400,000 General Fund appropriation to the Department of Administrative Services for a community-based organization, the YWCA of Greater Portland, to administer the Family Preservation Program (FPP) at Coffee Creek Correctional Facility. The FPP works with the Department of Corrections (DOC) to serve the best interests of the children of incarcerated parents by increasing therapeutic visitation between children and parents. The YWCA of Greater Portland is expected to provide facilitated case management including:

- Participation of a qualified mental health professional with training and experience with persons who have experienced trauma,
- Parenting skills training, including information on child development and attachment,
- Intensive communication between parents and the guardian or caregiver of the child,
- Facilitation of transportation of program participants to and from the prison,
- Facilitation of lodging to program participants when determined to be appropriate,
- Referrals to home visiting services and attorney services,
- Assistance in navigating state agency processes and nonprofit resources, and
- Reporting to the Legislature on measurable outcomes related to the welfare of the participating children and recidivism of participating incarcerated parents.

While the YWCA of Greater Portland will implement the program, DOC also has a role in the program's success. A budget note is included in the DOC section of this report to clarify the DOC role in administering the Family Preservation Program.

Office of the Governor

The Office of the Governor is increased by \$1,332,517 Lottery Funds for the establishment of five regional solutions coordinator (PEM/F) positions (4.92 FTE). Three of these positions were in the Office of the Governor on a limited-duration basis during the 2013-15 biennium. The other two positions were in the Oregon Business Development Department on a limited-duration basis during the 2013-15 biennium.

The Office of the Governor is increased by \$500,000 General Fund for federal programs coordination. The increase includes one PEM/G position (1.00 FTE) for the program, as well as any needed services and supplies. This function had previously been housed in the Oregon Business Development Department.

Public Employees Retirement System

The Subcommittee increased the Other Funds expenditure limitation by \$509,960 for the estimated fiscal impacts of House Bill 3495 (\$284,960) and Senate Bill 370 (\$225,000).

The Department of Administrative Services is expected to unschedule \$509,960 of expenditure limitation that may only be scheduled based upon the joint approval of the Office of the State Chief Information Officer and the Legislative Fiscal Office and after a more detailed evaluation of the information technology implementation plans for these two measures.

Department of Revenue

The Subcommittee approved funding for the second of a four phase project to replace most of the agency's core information technology systems (Core Systems Replacement project). The second phase includes: personal income, transit, self-employment, Senior Property Deferral, and estate and trust tax programs. The scheduled implementation date for this phase is December 1, 2015.

The Subcommittee approved \$25,929,440 of Other Funds expenditure limitation and the establishment of 33 permanent full-time positions (33.00 FTE), which is to be mostly financed with Article XI-Q bonds approved in House Bill 5005 (\$19 million). Project revenues also include an estimated \$6.9 million in bond proceeds that were authorized and issued during the 2013-15 biennium, but remained unexpended.

The Other Funds budget includes: personal services of \$7 million; \$532,500 for facility costs; \$12.6 million for vendor contract payments; \$1.3 million for an independent quality assurance; \$592,900 for project management costs; \$532,500 for change leadership; \$279,000 for hardware and software; and \$3 million for a contingency reserve.

Unless otherwise approved by the Legislature or the Emergency Board, the positions budgeted for the Core Systems Replacement (CSR) project are established as permanent full-time positions under the following conditions: (a) the positions will be abolished on or before the completion of the project; (b) the positions are to remain in the Core System Replacement program (i.e., CSR summary cross reference) and may not be transferred to any other program or used for any other purpose other than the development to the Core System Replacement project; and (c) the positions may not be included in any permanent finance plan action.

The Subcommittee approved \$3,935,414 General Fund for the agency's payments to the Department of Administrative Services for State Data Center charges related to Phase-I of the project (\$1.3 million), vendor contract maintenance costs to support the ongoing maintenance of the vendor product after installation (\$2.4 million), and non-bondable expenditures related to phase-II of the project (\$240,000).

The Subcommittee approved \$3,684,413 in additional General Fund Debt Service to support repayment of Article XI-Q General Obligation bond proceeds approved in House Bill 5005.

Other Funds expenditure limitation of \$375,000 is included for the cost of issuance of the bonds.

The Subcommittee adopted the Joint Committee on Ways and Means – Information Technology Subcommittee recommendations for the Core Systems Replacement project:

- Continue to work closely with and regularly report project status to the Office of the State Chief Information Officer and the Legislative

Fiscal Office throughout the project's lifecycle.

- Continue to follow the Joint State CIO/LFO Stage Gate Review Process.
- Report back to the Joint Interim Committee on Ways and Means on project status in the Fall of 2015 (on readiness to proceed with the CSR Project's Rollout 2 in December 2015), and to the Joint Committee on Ways and Means during the 2016 legislative session. • Utilize the Office of the State CIO's Enterprise Project and Portfolio Management system as it is deployed for all project review, approval, project status, and QA reporting activities throughout the life of the Core Systems Replacement Project, to include information on the new Fraud Analytics and Detection project planning and execution activities funded by package 151.

The Subcommittee also approved funding for the implementation of the Property Valuation System project, which is a commercial-off-the-shelf solution for an integrated appraisal application.

The Subcommittee approved \$1,880,000 of Other Funds expenditure limitation for project costs and the establishment of one permanent full-time position (0.92 FTE), which is to be financed with Article XI-Q bonds approved in House Bill 5005. This includes personal services of \$175,260; \$56,704 for capital outlay; \$1.5 million for vendor contract payments; and \$150,000 for an independent quality assurance.

Other Funds expenditure limitation of \$80,000 is included for the cost of issuance of the bonds.

The Subcommittee approved \$71,843 in General Fund Debt Service to support repayment of Article XI-Q General Obligation bond proceeds approved in House Bill 5005.

The Department of Administrative Services is expected to unschedule \$1.5 million of Other Funds expenditure limitation that may only be scheduled based upon the joint approval of the Office of the State Chief Information Officer, Department of Administrative Services – Chief Financial Office, and the Legislative Fiscal Office.

The Subcommittee adopted the Joint Committee on Ways and Means – Information Technology Subcommittee recommendations for the Property Valuation project:

- Continue to work closely with and regularly report project status to the OSCIO and LFO throughout the lifecycle of the proposed DOR Property Valuation System (PVS) project.
- Follow the Joint State CIO/LFO Stage Gate Review Process.
- Hire/retain or contract for qualified project management services with experience in planning and managing projects of this type, scope, and magnitude.
- Update the Business Case and foundational project management documents as required.
- Work with OSCIO to acquire Independent Quality Management Services as required to conduct an initial risk assessment, perform quality control reviews on the Business Case and foundational project management documents as appropriate, and perform ongoing, independent quality management services as directed by the OSCIO.
- Submit the updated Business Case, project management documents, initial risk assessment, and QC reviews to the OSCIO and LFO for Stage Gate Review.

- Report back to the Legislature on project status during the 2016 legislative session and/or to interim legislative committees as required.
- Utilize the Office of the State CIO's Enterprise Project and Portfolio Management system as it is deployed for all project review, approval, project status, and closeout reporting activities throughout the life of the DOR PVS project.

Secretary of State

The Subcommittee approved omnibus budget adjustments that include a \$1,149,279 total reduction in state agency assessments and billings for the Audits Division. Secretary of State revenues after this reduction remain sufficient to fully support the legislatively adopted budget for the Division and the Secretary of State.

Treasurer of State

The Subcommittee adopted the following budget note related to the intermediate term pool investment program, with the expectation that the State Treasurer also report on what education and training can be provided local governments on the benefits and risks associated with investing in the intermediate term pool. The Subcommittee also expressed an interest in being provided a comprehensive list of state agencies that should be considered candidates for making investments in the existing state intermediate term investment pool:

Budget Note:

The State Treasurer is requested to report to the interim Joint Committee on Ways and Means during Legislative Days in November 2015 on local and tribal government investment opportunities in the intermediate term pool or other intermediate term pooled investment options offered by the State Treasurer.

The report is to define how, and when, the program will be implemented; how investments will be made, overseen, and administered; the status of development of administrative rules; and how the program compares to the existing state intermediate term investment pool.

The cost of administering the program is to be detailed, including both State Treasury and third party costs, and the basis on which local and tribal governments will be charged.

The agency is to identify the potential level of participation, both immediate and over the long-term, as well as the level of potential investment. The agency is to report on the number of pending and signed investment agreements. The agency is to identify how it will accommodate future demand for program growth as well as any short-term program capacity or resource constraints issues.

CONSUMER AND BUSINESS SERVICES

Public Utility Commission

House Bill 2599 (2015) relates to termination of electric or natural gas service. It requires utilities that provide electricity or natural gas service to prepare reports on processes the utilities use to not terminate for non-payment utility service to homes during very hot or very cold weather. To ensure legislative review of these reports, the Subcommittee approved the following budget note:

Budget Note:

The Public Utility Commission is directed to collect reports from the governing boards of all independent utilities in the state on each

utility's program to ensure health and safety of vulnerable Oregonians during possible utility shutoffs that might take place during extreme weather situations. The Public Utility Commission will present a summary of the reports to the appropriate committees during the 2016 legislative session.

ECONOMIC AND COMMUNITY DEVELOPMENT

Oregon Business Development Department

The Subcommittee increased Oregon Business Development Department expenditures by \$257,767,573, including \$4,089,357 General Fund, \$1,500,000 Lottery Funds, \$227,178,216 Other Funds, and \$25,000,000 Nonlimited Other Funds.

Lottery Funds increases include \$1 million to supplement funding for the Regional Accelerator Innovation Network, and \$500,000 for transfer to the Oregon Growth Fund managed by the Oregon Growth Board. The additional funds for the Regional Accelerator Innovation Network bring total Lottery Funds support for the Network to \$2 million. Lottery Funds expenditures approved in this bill for the two programs are approved on a one-biennium basis and will be phased out in the development of the agency's 2017-19 biennium current service level budget.

Other Funds budget adjustments were approved for bond-funded programs approved in Senate Bill 5005 and House Bill 5030. The Other Funds expenditure limitation increases approved include:

- \$175 million of net Article XI-M general obligation bond Other Funds proceeds for seismic rehabilitation grants for schools. The proceeds are projected to finance approximately 115 school seismic rehabilitation projects during the 2015-17 biennium, and represent a more than eleven-fold increase over the \$15 million level of school seismic rehabilitation grant funding provided in the 2013-15 biennium. The Subcommittee also added \$4,089,357 General Fund to pay debt service on the bonds. The debt service funds are projected to allow the State Treasurer to issue \$50 million of net bond proceeds in the Spring of 2016, and the remaining \$125 million of bond proceeds in Spring of 2017. Debt service costs for the school seismic bonds are expected to total \$28.7 million General Fund, per biennium, when the costs fully phase in beginning in the 2017-19 biennium. The Subcommittee added \$1,870,000 Other Funds for the costs of issuing the Article XI-M bonds. These costs are paid from the gross proceeds of the bond sale. The agency may need to add staff to manage grant award activity associated with the Spring 2017 bond sale.
- \$30 million of net Article XI-N general obligation bond Other Funds proceeds for seismic rehabilitation grants for emergency services facilities. The proceeds are projected to finance approximately 50 emergency services facility seismic rehabilitation projects during the 2015-17 biennium, and represent a doubling of the \$15 million level of emergency services facility seismic rehabilitation grant funding provided in the 2013-15 biennium. The bonds will be issued in the Spring of 2017. Debt service costs for the emergency services facility seismic bonds are expected to total \$4.9 million General Fund, per biennium, when the costs fully phase in beginning in the 2017-19 biennium. The Subcommittee added \$440,000 Other Funds for the costs of issuing the Article XI-N bonds. These costs are paid from the gross proceeds of the bond sale.
- \$18 million of net Lottery Bond Other Funds proceeds for deposit to the Special Public Works Fund, a revolving loan fund. The \$18 million total includes \$5 million specifically dedicated to finance levee inspection and repair projects as authorized by Senate Bill 306. The remaining \$13 million of bond proceeds may be applied to any eligible Special Public Works Fund projects. The funding designated for

levees is projected to support approximately 17 levee projects, and the undesignated funding is projected to support an additional 11 projects. Because the bonds will be issued in the Spring of 2017, most project activity will occur after the end of the current biennium. Debt service costs for the Lottery bonds are expected to total \$3.8 million Lottery Funds, per biennium, when the costs fully phase in beginning in the 2017-19 biennium. The Subcommittee added \$323,147 Other Funds for the costs of issuing the Lottery bonds. These costs are paid from the gross proceeds of the bond sale. The \$18 million of bond proceed expenditures were added to the agency budget as Nonlimited Other Funds, and as such, are not included in the expenditure limitation increases included in the bill.

- \$7 million of net Lottery Bond Other Funds proceeds for deposit to the Brownfields Redevelopment Fund, a revolving loan fund. The funding is projected to support approximately 27 brownfields redevelopment projects. Because the bonds will be issued in the Spring of 2017, most project activity will occur after the end of the current biennium. Debt service costs for the Lottery bonds are expected to total \$1.5 million Lottery Funds, per biennium, when the costs fully phase in beginning in the 2017-19 biennium. The Subcommittee added \$129,239 Other Funds for the costs of issuing the Lottery bonds. These costs are paid from the gross proceeds of the bond sale. The \$7 million of bond proceed expenditures were added to the agency budget as Nonlimited Other Funds, and as such, are not included in the expenditure limitation increases included in the bill.
- \$13 million of net Lottery Bond Other Funds proceeds for Regional Solutions capital construction priority projects identified by Regional Solutions Advisory Committees. The funding is projected to support approximately 28 capital construction projects in ten of the state's eleven Regional Solutions regions. The projects are funded with a combination of \$995,000 of Lottery bond proceeds remaining from the Spring 2015 bond sale and \$12,005,000 of new bond proceeds from Lottery bonds that will be issued in the Spring of 2017. Because most of the funding will become available late in the biennium, most project activity will occur after the end of the current biennium. Debt service costs for the Lottery bonds are expected to total \$2.6 million Lottery Funds, per biennium, when the costs fully phase in beginning in the 2017-19 biennium. The Subcommittee added \$243,677 Other Funds for the costs of issuing the Lottery bonds. These costs are paid from the gross proceeds of the bond sale. The Subcommittee approved \$13 million of support to fund projects on the identified Regional Solutions project list that total more than \$14 million in costs. The project list is posted on the Oregon Legislative Information System website with the Capital Construction Subcommittee July 3, 2015 meeting materials. The agency is directed to best apply the available funding toward the project list identified costs, taking into consideration other possible funding sources available for individual projects. If the agency determines that funds would be better utilized to support other projects not on the identified project list, it must obtain legislative approval to do so before the lottery bonds are issued. The agency is also expected to work with the Governor's Office to allow the agency to review proposed Regional Solutions projects to ensure they meet certain criteria, including: supporting job growth and retention, obtaining leverage from other sources, possessing a clear business plan for sustainability without additional state funding, meeting regional priorities recommended by a Regional Solutions Advisory Committee, and, if bond proceeds are requested as the funding source, qualifying as a capital construction project.
- \$4.5 million of net Lottery Bond Other Funds proceeds for cultural capital construction projects. The funding is specifically dedicated as follows: \$2 million for the Oregon Shakespeare Festival, \$1.5 million for the Portland Japanese Garden, \$600,000 for Oregon Public Broadcasting, and \$400,000 for the Aurora Colony Museum. The bonds will be issued the Spring of 2017. Debt service costs for the Lottery bonds are expected to total approximately \$956,000 Lottery Funds, per biennium, when the costs fully phase in beginning in the

2017-19 biennium. The Subcommittee added \$68,184 Other Funds for the costs of issuing the Lottery bonds. These costs are paid from the gross proceeds of the bond sale. The \$4,568,184 of bond proceeds and costs of issuance expenditures were added to the agency's Arts and Cultural Trust Other Funds expenditure limitation.

- \$1,562,157 of net Lottery Bond Other Funds proceeds for repairs and upgrades to the Port of Brookings Harbor dock. The bonds will be issued in the Spring of 2017. Debt service costs for the Lottery bonds are expected to total approximately \$300,000 Lottery Funds, per biennium, when the costs fully phase in beginning in the 2017-19 biennium. The Subcommittee added \$41,812 Other Funds for the costs of issuing the Lottery bonds. These costs are paid from the gross proceeds of the bond sale. The \$1,603,969 of bond proceeds and costs of issuance expenditures were added to the agency's Infrastructure Finance Authority Other Funds expenditure limitation.

Housing and Community Services Department

Other Funds expenditure limitation is increased by \$10 million for additional payments anticipated due to the passage of House Bill 3257, which extended until 2018 the period under which an additional \$5 million annually could be collected from residential electricity consumers for low income bill payment assistance. The funds are collected from utilities, transferred to the Housing and Community Services Department, and distributed to eligible Oregonians by local Community Action agencies under contract.

Other Funds expenditure limitation for the Housing and Community Services Department is increased by \$585,000, attributable to cost of issuance for \$40 million in Article XI-Q bonds issued for affordable housing development. The housing to be developed with the bonds will be targeted to low income individuals and families, pursuant to the provisions of House Bill 2198. That bill directs the Department to distribute the resources available based on criteria including geography, market data, need, and other factors, and directs the Department to develop the housing with the advice of the State Housing Council and to work with stakeholders to achieve objectives that include reducing project costs and reaching underserved communities. It is assumed that the investment will result in an estimated 1,600 units of new affordable housing developed. Expenditure limitation for a period of six years for the project amount (\$40 million) is located in House Bill 5006.

Other Funds expenditure limitation in the amount of \$2,551,972 is included to enable the Housing and Community Services Department to expend proceeds from Lottery bonds for preservation of affordable housing with expiring federal subsidies. Of this amount, \$2.5 million is attributable to project costs, and \$51,972 is related to cost of issuance.

Eligible projects for which these funds can be expended are defined as the following:

- Privately owned multi-family rental properties where at least 25% of the units are subsidized by a project-based rental assistance contract through the USDA Rural Development or the US Department of Housing and Urban Development;
- Existing manufactured housing communities to be acquired by a mission-based non-profit organization, resident cooperative, tenants' association, housing authority, or local government; or
- Public housing projects undergoing a preservation transaction which involves a comprehensive recapitalization, and which will secure ongoing rental subsidies.

Other Funds expenditure limitation in the amount of \$20,307,817 is included to enable the Housing and Community Services Department to expend proceeds from Lottery bonds for the purpose of financing construction of housing for individuals with mental illness or addiction disorders. Of this amount, \$20 million is attributable to project costs, and \$307,817 is related to cost of issuance. This limitation applies to the 2015-17 biennium only, as the project is not anticipated to be recurring. To the extent that proceeds are not fully expended for mental health housing in 2015-17, the 2017-19 agency request budget should include a request that limitation for remaining proceeds be carried forward into the 2017-19 biennium. The Housing and Community Services Department will develop a process similar to but separate from its existing “Notice of Funds Availability” that is currently used to identify partners and financing for affordable housing projects. The Oregon Health Authority will work with the Housing and Community Services Department (HCSD) throughout the process of utilizing the \$20 million of bonding proceeds for the development of housing for individuals with mental illness or addictions disorders. The Oregon Health Authority will continue to work with their partners, including the National Alliance on Mental Illness (NAMI) and the Oregon Residential Provider Association (ORPA), as well as other stakeholders, to set up a workgroup that will be responsible for providing recommendations on project priorities to HCSD.

Department of Veterans’ Affairs

Additional one-time General Fund in the amount of \$500,000 is appropriated to the Oregon Department of Veterans’ Affairs for support for County Veterans’ Service Officers. This is in addition to the \$246,046 General Fund investment above the 2015-17 current service level that was included in the Department’s budget bill, Senate Bill 5539. With this increase, the amount of General Fund directed to County Veterans’ Service Officers for the 2015-17 biennium will total \$4.7 million, \$4.2 million of which is intended to be ongoing in future biennia.

EDUCATION

Department of Education

The Subcommittee approved a net increase of \$51,990,543 General Fund and \$66,009,457 million Lottery Funds for the State School Fund. The increase reflects three separate actions:

- An increase of \$105,782,400 General Fund represents the increase due to the “trigger” included in the State School Fund bill (House Bill 5017) which directed to the State School Fund 40 percent of any General Fund increase in the 2015-17 revenue estimates between the March 2015 and the May 2015 forecasts;
- An additional \$12,217,600 General Fund is made available for the State School Fund beyond the amount resulting from the “trigger”; and
- A decrease of \$66,009,457 General Fund and a corresponding \$66,009,457 Lottery Funds increase is recommended to balance the use of available Lottery Funds across the entire state budget.

The Legislature assumes the State Land Board will increase the distribution from the Common School Fund from the current four percent to a five percent distribution which results in an estimated increase of \$27,544,741 of revenue available to districts through the school funding formula. If the State Land Board takes this action, there will be an equivalent of just over \$7.4 billion in combined General Fund, Lottery Funds, and these additional Common School Funds resources for the 2015-17 biennium.

House Bill 5017, the State School Fund bill, split the amount available to be distributed from the State School Fund between the two school years on an even basis or \$3,629,130,346 in each school year. The Subcommittee approved placing all of the additional State School Fund resources made available in this bill to be distributed in 2016-17, the second school year of the biennium. This results in a split between the two school years of 49.2 percent for 2015-16 and 50.8 percent for 2016-17.

The Subcommittee approved a one-time \$3,300,000 General Fund increase in the appropriation for the Department of Education's nutrition programs relating to the Farm to School program under ORS 336.431. This increase is over and above the current \$1,219,189 General Fund appropriation included in the Department of Education's budget bill (House Bill 5016) for this program. It is anticipated that grants under this program will be changed by language in Senate Bill 501 that is intended to increase participation in the program by school districts. The Department of Education may use up to two percent of the total funding for the Farm to School program under ORS 336.431 for the administration of the program. Of the remaining amount, the Department is instructed to allocate approximately 80% of the remaining funding for the noncompetitive grants and approximately 20% of the remaining funding for competitive grants.

The Subcommittee increased the funding for Relief Nurseries in the Early Learning Division by a one-time \$700,000 General Fund appropriation. This brings the total amount of state funding for Relief Nurseries to \$8,300,000 General Fund.

The Subcommittee approved a one-time increase of \$500,000 General Fund for the new leadership program designed to recruit and train "district turnaround leaders" to assist schools and districts to increase their overall achievement measures. This increase and the amount included in the budget bill for the Oregon Department of Education (House Bill 5016) brings the total amount of funding for this program to \$2,000,000 General Fund.

The Subcommittee approved the establishment of an Other Funds expenditure limitation of \$126,210,000 for the proceeds of Title XI-P general obligation bonds, which are for grants to assist school districts with their capital costs of facilities. The grant, funded with bond proceeds, provided to each district must be matched by the district to finance capital costs for projects that have received voter approval for locally issued bonds. State bond proceeds may not be used for operating costs of the district. The bonding bill (House Bill 5005) includes the authorization for issuing \$125,000,000 of Title XI-P bonds. Costs of issuance are estimated at \$1,210,000 Other Funds.

Budget Note:

The Department of Education is instructed to use \$500,000 General Fund from the Early Intervention/Early Childhood Special Education (EI/ECSE) budget to support two to four communities in developing pathways from screening to services to make it easier for families to receive services that screening identifies. Use of this funding is aligned with best practices for how EI/ECSE programs should address the needs of children and their families who do not meet the legal requirements for eligibility and connect them to other services and supports. The Early Learning Council shall report on the progress and outcomes of this work to the appropriate legislative committee and include any recommendations for the 2017 legislative session.

Budget Note:

Given the expanded Healthy Families Oregon home visiting funding added to the Early Learning Division's budget, the Early Learning

Division and the Oregon Health Authority are instructed to:

- Develop a set of outcome metrics connected to evidence of impact for consideration by the Early Learning Council and the Oregon Health Policy Board that any home based service that receives state dollars must meet in order to continue to receive state funds, effective July 1, 2016;
- Develop a plan and timeline for integrating the state's professional development system for early learning providers with the emerging professional development system for home visitors; and
- Develop a common program agnostic screening tool to identify potential parent/child risk factors and intake form for families who are eligible for home visiting services and require implementation by state funded home visiting programs by July 1, 2016.

The Early Learning Division and the Oregon Health Authority shall report on progress to the appropriate legislative committee.

Budget Note:

The Department of Education is instructed to survey school districts on the financial effects of the: (1) adaptation of new instructional hour minimums, (2) mandated full scheduling of 92 percent of students, and (3) projections for programs and personnel possibly eliminated in order to comply with these mandates at current budget levels. The Department is to report back to the Joint Committee on Ways and Means by February 1, 2016.

Higher Education Coordinating Commission

The Subcommittee approved a one-time \$1,500,000 General Fund appropriation to fund academic counselors at community colleges during the second academic year of the biennium. Community Colleges currently have limited academic counseling services in place. With the potential of more students as a result of the tuition waiver grant program established in Senate Bill 81, there is concern that those limited resources will be stretched even further. Prior to the distribution of these funds, the Higher Education Coordinating Commission is to report to the Joint Committee on Ways and Means during the 2016 legislative session or to the Emergency Board what factors or variables will determine the distribution of these funds.

The Subcommittee approved the establishment of a \$1,542,827 Other Fund expenditure limitation for a grant to the Linn Benton Community College for the construction and capital expenditures for the Advanced Transportation Technology Center. This Center is established to advance statewide transportation energy policy as well as to provide education and training of students at the Community College. The project is to include an automotive technician training center with an alternative fuel area, a heavy transportation/diesel training center, an innovation center, and an anaerobic digester for renewable gas production. The Other Funds expenditure limitation increase represents the \$1,500,000 state share of the project cost and \$42,827 for the cost of issuing the bonds. Both of these items are funded through the sale of Lottery bonds.

The Subcommittee approved \$2,500,000 General Fund for the College of Forestry at Oregon State University to operate a center for the manufacturing and design of advanced wood products in cooperation with the University of Oregon. The \$2.5 million represents a partial biennium of expenses, and as such, state support for the center rolls up to \$3,400,000 in the 2017-19 biennium. The Subcommittee also approved \$300,000 General Fund on a one-time basis for use by Eastern Oregon University for costs associated with starting a collegiate wrestling program. The Subcommittee approved a one-time \$350,000 General Fund appropriation to the Higher Education Coordinating Commission (HECC) for a

grant to the College Inside program. This is a program designed to allow incarcerated students obtain a two-year college degree that is transferable to a four-year university.

The Subcommittee approved a one-time \$350,000 General Fund appropriation to Higher Education Coordinating Commission (HECC) for a grant to the College Possible organization. This program provides mentoring, coaching, and other assistance to low income students to encourage them to go to college and help them apply for college and financial aid.

The Subcommittee approved a \$62,300 General Fund appropriation for use by Oregon Solutions at Portland State University to pay the expenses of the Task Force on the Willamette Falls Navigation Canal and Locks as they conduct the work directed in SB 131.

The Subcommittee clarified that of the \$151,390,838 General Fund increase approved for the Public University Support Fund program area in House Bill 5024, \$41,095,238 was for continuation of the tuition buy down funding provided to public universities in House Bill 5101 (2013 Special Session).

The Subcommittee approved a \$4,477,055 increase in the Other Funds expenditure limitation for payment of the costs of issuing Article XI-F general obligation bonds, Article XI-G general obligation bonds, and Article XI-Q general obligation bonds on the behalf of community colleges and public universities.

The Subcommittee also approved giving the Higher Education Coordinating Commission (HECC) nonlimited authority to make Other Funds expenditures necessary to disburse general obligation bonds sold during the 2013-15 biennium for the benefit of public universities. Disbursement of future bond sales will be done by HECC, but during the 2013-15 biennium the Department of Administrative Services (DAS) was given initial authority to disburse these proceeds. As the bond project duties related to issuance of Article XI-F and XI-G general obligation bonds transition from DAS to HECC per House Bill 3199, both agencies were given nonlimited authority to disburse proceeds of bonds issued during 2013-15. The total amount of undisbursed proceeds as of June 30, 2015 from 2013-15 bond sales is \$196,523,642. The initial estimate of the amount of 2013-15 proceeds HECC will disburse per agreements with public universities in 2015-17 is \$50,648,642, with DAS disbursing \$145,875,000. These amounts will likely change once the timing of final transition from DAS to HECC is known.

Oregon Health & Science University

The Subcommittee approved the establishment of a \$200,035,000 Other Funds expenditure limitation for DAS to disburse Article XI-G bond proceeds to the Oregon Health and Science University (OHSU) to fund Knight Cancer Institute capital construction costs. In addition, the Subcommittee approved an \$8,522,485 General Fund appropriation to pay debt service on XI-G bonds issued during the 2015-17 biennium for the Knight Cancer Institute project.

House Bill 3199 (2015) provided that the Department of Administrative Services (DAS) would continue to make debt service payments on behalf of OHSU on legacy debt issuance, including \$30,909,888 debt service paid with Tobacco Master Settlement Agreement (TMSA) funds. To accommodate this requirement, the Subcommittee approved providing DAS with \$38,689,306 Other Funds expenditure limitation to make debt

service payments. Revenue for making \$7,779,418 debt service payments on non-TMSA supported Article XI-F bond debt will be provided by OHSU.

HUMAN SERVICES

Department of Human Services

To support two pilot projects in the Child Welfare program, the Subcommittee approved \$800,000 General Fund and increased Federal Funds expenditure limitation by \$160,000; funding is approved on a one-time basis with future program support or integration dependent on resources and pilot outcomes. The following budget note, which lays out the goals and expectations for the pilot projects, was also approved:

Budget Note:

The Department of Human Services is directed to work with community-based organizations to develop and implement two pilot programs, one serving a rural part of the state and the other one serving an urban area, to improve the quality and effectiveness of foster care for children and wards who have been placed in the Department's legal custody for care, placement, and supervision. The programs shall target youth who have experienced multiple foster care placements and who are at significant risk of suffering lifelong emotional, behavior, developmental, and physical consequences due to disrupted and unsuccessful placements in the foster care system. The following services for foster parents shall be included in the programs: trauma-informed, culturally appropriate care training; behavioral supports; ongoing child development and parent training; 24-hour, daily on-call caregiver support; respite care; tutoring; and assistance with locating immediate and extended healthy, biological family members.

Each pilot program will have an advisory group that includes at least one individual who has experienced multiple placements in the foster care system and at least one foster parent. The legislative expectation is that at least \$800,000 of the total funding for the pilots will be provided directly to community-based organizations to deliver program services. On or before May 1, 2017, the Department shall report to the legislative committees having authority over the subject areas of child welfare and juvenile dependency regarding the status of the pilot programs and, to the extent possible, placement outcomes for children and wards who participated in the pilot program and children and wards not receiving pilot program supports. The Department will also provide an update on the pilot projects as part of its budget presentation during the 2017 legislative session.

To provide and test targeted community college career pathway training opportunities for Temporary Assistance for Needy Families and Employment Related Day Care clients, the Subcommittee approved \$500,000 General Fund for a one-time pilot project in Jackson and Josephine counties. Eligible clients will be in enrolled training programs that match up with in-demand, high wage job openings, such as in the healthcare or information technology areas. Clients will receive a scholarship/stipend to help augment Pell grants, with average awards expected to be about \$2,000 per client; about 150 clients are estimated to participate in the program over the biennium. The pilot project is a joint effort between the Rogue Workforce Partnership, the Oregon Employment Department, and the Department of Human Services.

The Subcommittee approved \$350,000 General Fund to provide transitional (one-time) funding for the Home Care Commission's private pay registry. This program, which enables private payers to buy home care services through the home care registry, was authorized by House Bill 1542 (2014) and is expected to be fee supported once fully up and running in January 2016.

The Subcommittee approved \$1,800,000 General Fund to restore a reduction made in the primary budget bill for the Department (House Bill 5026). The funding will provide ongoing support for options counseling provided through the Aging and Disability Resource Connection (ADRC). The program helps people identify their long term care needs and preferences, understand the service options available to them, and make decisions about their care.

The Subcommittee approved \$400,000 General Fund, on a one-time basis, to increase support funding for the Oregon Hunger Response Fund (Oregon Food Bank); between funding in both the DHS and the Housing and Community Services Department budgets, a total of \$3.2 million General Fund is now appropriated in the 2015-17 biennium to help the fund fight hunger.

The Subcommittee approved \$150,000 General Fund to provide ongoing support for the Hunger Task Force, which is charged with advocating for hungry persons, and contributing to the implementation and operation of activities and programs designed to alleviate or eradicate hunger in Oregon. House Bill 2442 (2015) designates the Department of Human Services as the entity in administering the state policy on hunger and also requires the agency to support and staff the task force, based upon the availability of legislatively approved funding for such purposes.

To cover Phase II development and implementation of a streamlined and integrated Statewide Adult Abuse and Report Writing System, the Subcommittee approved \$2,277,037 General Fund and \$3,355,000 Other Funds expenditure limitation (\$5.6 million total funds). Phase I planning funding was approved by the Emergency Board in May 2014, based upon demonstrated need for a stable, integrated adult abuse data and report writing system to deal with Oregon's growth in an aging population, an annual increase of 5-8% in abuse referrals, and an increased need for services across all demographics. The Other Funds portion of the project will be financed with Article XI-Q Bonds, the General Fund amount includes \$839,543 to cover debt service payments in the second year of the biennium.

The Department will continue its work on the project according to direction from the Joint Ways and Means Subcommittee on Information Technology, which recommended incremental and conditional project approval. Required actions under that guidance include, but are not limited to, working closely with and regularly reporting project status to the Office of the State Chief Information Officer (OSCIO) and Legislative Fiscal Office (LFO), while following the joint OSCIO/LFO Stage Gate Review Process. A detailed list of next steps and requirements was transmitted to the agency. The Department of Administrative Services is expected to unschedule the General Fund and Other Funds expenditure limitation for the project pending finalization of a controlled funding release plan that is tied to planning needs and the completion of certain stage gate requirements. Funding may be rescheduled with the joint approval of the OSCIO, the Chief Financial Officer, and LFO.

House Bill 5026 included a rate increase for providers serving people with Intellectual and Developmental Disabilities (IDD). To ensure clarity of legislative direction regarding implementation of the rate increase, the Subcommittee adopted the following budget note:

Budget Note:

It is the intent of the Legislature that \$26.7 million total funds in provider rate increases approved in House Bill 5026 (budget bill for the Department of Human Services) result in wage increases for direct care staff serving people with intellectual and developmental disabilities (IDD). The legislative expectation is that compensation (wages and/or benefits) for direct care staff in programs serving people with IDD should be increased by at least 4% during the 2015-17 biennium.

During the 2016 legislative session, an informational hearing will be scheduled for IDD community providers to present the actions they have taken or plan to take to meet budget note requirements. On a parallel track and prior to seeking an allocation from the special purpose appropriation, the Department of Human Services will compile information on any complaints received regarding wage increases and consult with legal counsel and contract staff to determine the best, yet most cost-effective, approach to address potential provider non-compliance. The Department will also report to the Joint Committee on Ways and Means during the 2017 legislative session on activity related to and progress made under this budget note.

For the same program, the Subcommittee approved the budget note set out below on exploring a provider assessment component to help fund IDD programs. Along with the required reporting, and depending on assessment's content or results, the Department may also work with the appropriate interim policy committee on potential statutory changes.

Budget Note:

The Department of Human Services shall work with the intellectual and developmental disabilities (IDD) provider community and appropriate state and federal agencies to assess the feasibility, potential benefits, and potential drawbacks of a provider assessment, or transient lodging tax, on the provider organizations serving adults with IDD, with the goal of maximizing federal matching funds for IDD services and addressing the direct care workforce shortage. The Department shall report the results of its assessment to the Legislature by December 1, 2015.

Oregon Health Authority

Senate Bill 5507 approves \$10,000,000 one-time General Fund resources to provide grants to safety net providers, through the Safety Net Capacity Grant Program. This program will provide grants to community health centers, including Federally Qualified Health Centers and Rural Health Centers, as well as School-Based Health Centers, with the goal of providing services for children not eligible for any current state program. The agency will need to develop an application process for these competitive grants; develop a process to award the grants, including amounts to fund education and outreach to the target population; develop a process for clinics to report services rendered; provide reporting to the Legislature and stakeholders; and include a stakeholder engagement process to advise the program development and implementation. The agency expects to fund two full-time positions out of this total funding, in order to implement the program as described.

Because of the continuing transition of the Oregon Health Plan caseload, the Subcommittee recognized the increased risk of caseload forecast changes. A special purpose appropriation of \$40 million is made to the Emergency Board for caseload costs or other budget challenges in either the Oregon Health Authority (OHA) or Department of Human Services. The Subcommittee included two budget notes related to the Oregon Health Plan:

Budget Note:

The Oregon Health Authority shall engage in a rural hospital stakeholder process to gather input on potential transformation strategies to ensure that Oregon's small and rural hospitals continue to be sustainable in the future. Potential transformation strategies could include grant or bridge funding, transformation pilot programs, or incentive programs to assure funding stability for hospitals and access to health care services for rural Oregonians. Based on the work with stakeholders, OHA will develop a set of recommendations.

OHA shall report to the Joint Committee on Ways and Means Committee during the 2016 legislative session on any hospital assessment revenues received for the 2013-15 biennium and available for use in 2015-17. The revenue may include assumed hospital assessment revenue in the OHA 2015-17 budget or any additional hospital assessment revenue not included in the OHA budget, that could potentially be used to fund one or more of the strategies recommended, but not to exceed \$10 million. The agency should include in that report any information on federal matching resources that may be available for those strategies.

Budget Note:

The Oregon Health Authority is directed to prepare a report in collaboration with the Employment Department stating the number of Oregonians enrolled in the Oregon Health Plan while employed at least 260 hours in any calendar quarter by a company with 25 or more employees. This report should be presented to the interim Joint Committee on Ways and Means, Subcommittee on Human Services no later than January 2016.

The Subcommittee approved a one-time appropriation of \$160,000 General Fund for OHA to contract with the Dental Lifeline Network, or other qualified organization, for development and operation of a Donated Dental Services program to benefit needy, disabled, aged, and medically compromised individuals. The program will establish a network of volunteer dentists, including dental specialists, to donate dental services to eligible individuals, establish a system to refer eligible individuals to appropriate volunteers, and develop and implement a public awareness campaign to educate individuals about the availability of the program. The program will report to OHA at least annually the number of people served, procedures during the year, procedures completed, and the financial value of the services completed. The funding is part of a commitment to spending on senior programs that originated in the 2013 special session.

The Subcommittee approved \$200,000 General Fund for providing fresh Oregon-grown fruits, vegetables, and cut herbs from farmers' markets and roadside stands to eligible low-income seniors under the Senior Farm Direct Nutrition Program. Another \$100,000 General Fund was added for the same purpose for eligible individuals through the Women, Infants and Children Program. Both these program enhancements are one-time.

General Fund was increased by \$600,000 for school-based health centers. This funding will provide state grants of \$300,000 to three new school-based health centers that recently completed their planning processes. It will also allow the agency to provide \$300,000 of funding to existing school-based health centers to bring all centers closer to parity in state funding.

Other Funds expenditure limitation is increased by \$137,152 to increase the staffing level for the Pesticide Analytical Response Center by one half-time position (0.50 FTE). Funding for the position will come as a special payment from the Department of Agriculture supported by an increase in pesticide product registration fees.

The Subcommittee directed the Oregon Health Authority to collaborate with the Department of Consumer and Business Services and the University of Oregon, in the following budget note:

Budget Note:

The Oregon Health Authority, in collaboration with the Department of Consumer and Business Services, shall work with the University of Oregon on the vaccination program for meningitis. The Department of Consumer and Business Services shall ensure timely insurance coverage is covering appropriate costs for those with insurance. The Oregon Health Authority shall, within existing emergency preparedness funds, work with the University of Oregon on funding appropriate costs. The Oregon Health Authority and the University of Oregon shall report to the appropriate legislative committee the final cost of the program including any additional funding needs by December 2015 and any recommendations to ensure effective and efficient response to any future events.

Lottery bond proceeds of \$20 million were approved for the development of housing for individuals with mental illness or addiction disorders, through the Housing and Community Services Department (HCSD). OHA will work with HCSD throughout the process used to identify partners and financing for projects. OHA will continue to work with their partners, including the National Alliance on Mental Illness and the Oregon Residential Provider Association, as well as other stakeholders, to set up a workgroup that will be responsible for providing recommendations on project priorities to HCSD.

Lottery bond proceeds of \$3 million were approved to fund a portion of the costs to build a new sixteen-bed facility for the Secure Adolescent Inpatient Program, run by Trillium Family Services. These funds will be distributed through the Department of Administrative Services. This project will replace old, obsolete facilities at the Children's Farm Home campus near Corvallis. This program serves adolescents at the highest level of mental health acuity in the state, including children on the Oregon Health Plan, and those referred through the Oregon Youth Authority and the Juvenile Psychiatric Security Review Board.

The following budget note was included related to the Addictions and Mental Health programs:

Budget Note:

The Oregon Health Authority shall conduct a minimum of five community meetings in a variety of geographic locations across the state. The goal of the community meetings is to capture, understand, and report to the Legislature on the experience of children, adolescents, and adults experiencing mental illness and their ability to access timely and appropriate medical, mental health and human services to support their success in the community. The meetings shall not be restricted to publicly financed services or individuals eligible for public benefits. The focus will be on the entirety of the Oregon mental health system, both public and private. Issues to be considered should include but not be limited to:

- Access to child and adolescent services
- Boarding in hospital emergency rooms
- Access to housing, addiction, and recovery services
- Family support services

- Waiting periods for services
- Workforce capacity
- Affordability for non-covered individuals to access mental health services
- Coordination between behavioral health and physical health services

The Oregon Health Authority shall consult and coordinate with stakeholders to plan and conduct the community meetings. The Oregon Health Authority is expected to report progress and findings to the appropriate legislative committees and the 2016 Legislature.

The Subcommittee included the following direction in regards to fee-for-service (both Medicaid and non-Medicaid) rate increases to addiction treatment providers:

Budget Note:

The Oregon Health Authority will use \$3.5 million of the \$6 million included in the new investments for A&D services included in the OHA 2015-17 budget to increase rates to addiction treatment providers. OHA will report the final rate increases to the interim Joint Committee on Ways and Means by November 2015.

Long Term Care Ombudsman

The Subcommittee added \$100,000 General Fund on a one-time basis to provide interim support for the agency as it continues to ramp up new programs, including advocacy for residents of independent living sections of Continuing Care Retirement Communities as required under Senate Bill 307 (2015). The agency has also been undergoing a leadership transition and is facing challenges in volunteer recruitment; the additional funding will allow the Long Term Care Ombudsman to contract or to make a short-term hire for program development expertise to focus on these needs over the first year of the biennium.

JUDICIAL BRANCH

Oregon Judicial Department

The Subcommittee increased Judicial Department expenditures by \$40,955,000, including \$700,000 General Fund, and \$40,255,000 Other Funds.

The Subcommittee appropriated \$100,000 General Fund to increase funding for the Oregon Law Commission. This action raises total General Fund support for the Oregon Law Commission in the 2015-17 biennium budget to \$331,319, a 45.3 percent increase over the 2013-15 biennium funding level. The Subcommittee also added a one-time General Fund appropriation of \$600,000, for support of the Oregon State Bar Legal Services Program (a.k.a., Legal Aid). The General Fund appropriation will supplement the \$11,900,000 of Other Funds support for Legal Aid provided in Senate Bill 5514, and is approximately a 5 percent increase over the base funding level.

The Subcommittee approved Other Funds expenditure limitation increases for county courthouse capital construction projects funded through the Oregon Courthouse Capital Construction and Improvement Fund (OCCCF). The legislatively adopted budget includes \$27,775,000 of Article

XI-Q bond proceeds authorized in House Bill 5005 for the courthouse capital construction projections funded through the OCCCIF. The approved bond proceeds include \$17.4 million for the Multnomah County Central Courthouse project, \$2.5 million for the Jefferson County Courthouse project, and \$7,875,000 for the Tillamook County Courthouse project.

The Legislature previously authorized Article XI-Q bonds for the Multnomah County and Jefferson County projects in the 2013-15 biennium budget. The Subcommittee increased the OCCCIF Other Funds expenditure limitation by \$39.8 million to allow expenditures of up to \$19.9 million of bond proceeds and of up to \$19.9 million of required county matching funds for these two projects. The Subcommittee did not approve Other Funds expenditure limitation for the Tillamook County Courthouse project. The Judicial Department will report to the Joint Committee on Ways and Means or to the Emergency Board on the Tillamook County Courthouse project, and request Other Funds expenditure limitation for the project, prior to distributing any money from the OCCCIF for the Tillamook County Courthouse project.

The Subcommittee also increased the Judicial Department Operations Other Funds expenditure limitation for operations by \$455,000, for the cost of issuance of Article XI-Q bonds for OCCCIF projects.

NATURAL RESOURCES

Department of Agriculture

The Subcommittee approved a \$25,000 General Fund increase to the Predator Control program, bringing the program total to \$447,718 General Fund, as well as, a \$30,000 General Fund increase to the Wolf Compensation and Grant Assistance program, bringing the program total to \$233,000 General Fund.

The Subcommittee also approved a \$1,747,018 Other Funds expenditure limitation increase to support enhancements to the Pesticides program. The enhancements include the addition of 6 positions (5.26 FTE) to the program. The positions will be made up of four pesticide investigators (NRS 3), one customer service representative (NRS 3), and one case reviewer (NRS 4). The additional investigative staff is needed to manage existing caseload requirements. Other enhancements include laboratory testing and sampling of pesticides, as well as, modification of the existing investigation and case management database. An additional \$108,326 Other Funds was approved to increase the ODA staffing level for the Pesticide Analytical Response Center (PARC) by 0.50 FTE. ODA also increased the existing transfer made to the Oregon Health Authority (OHA) by \$137,152 Other Funds to increase the ODA paid OHA staffing level for the Pesticide Analytical Response Center by 0.50 FTE. Revenue to support these various Other Funds increases will come from increases in pesticide product registration fees approved in House Bill 3459.

Department of Environmental Quality

The Subcommittee approved \$280,000 General Fund for a Portland Harbor Statewide Coordination policy position. According to the Governor's requested budget, this is a senior-level policy position that will be housed in DEQ, but will report to the Governor's natural resources policy advisor. This Operations and Policy Analyst 4 position will be phased in on January 1, 2016 (0.75 FTE). In addition, \$110,092 Other Funds

expenditure limitation and one half-time NRS 3 position (0.50 FTE) was approved for implementation of the residential asbestos inspection program established by Senate Bill 705, which passed earlier this session

Department of Fish and Wildlife

The Subcommittee approved allowing the Oregon Department of Fish and Wildlife to retain \$5,000 General Fund savings from Department of Administrative Services' assessment reductions that will be used to pay for the study in Senate Bill 779. This study is to determine whether ORS 497.006 should be amended to allow additional members of the uniformed services to be considered resident persons for the purpose of purchasing licenses, tags, and permits issued by the State Fish and Wildlife Commission.

The Subcommittee approved a one-time General Fund appropriation of \$500,000 to improve and protect sage grouse habitat through actions, such as juniper removal, that improve the resilience of sagebrush habitat to wildfire.

The Subcommittee also approved a \$25,000 General Fund increase in state support for the Predator Control program, bringing the state support total to \$453,365 General Fund.

Department of Forestry

The Subcommittee approved a one-time appropriation of \$809,377 General Fund to the Fire Protection Division of the Oregon Department of Forestry (ODF) for sage grouse habitat protection and improvement. This amount is in addition to amounts contained in the agency's budget bill for the same purposes. The appropriation includes \$109,377 for a limited-duration, half-time (0.50 FTE) Natural Resource Specialist 1 position and associated services and supplies to provide administrative support and technical training to rangeland protection associations. The appropriation also includes \$700,000 for grants to support rangeland wildfire threat reductions. The grant funding is for eligible services, supplies, and equipment expenditures of rangeland fire protection associations and counties in addressing rangeland wildfire management and suppression on unprotected or under-protected lands. The funding is to be implemented consistent with wildfire-related provisions of Oregon's plan for addressing the conservation of the greater sage grouse and rural community vitality. Oregon will provide the funding to the Oregon Watershed Enhancement Board, which will oversee the grant program in conjunction with other ODF grant programs.

Department of Land Conservation and Development

The Subcommittee approved the reduction of the General Fund appropriation made to the Department of Land Conservation and Development for the Southern Oregon Regional Pilot Program (SORPP) in the agency's 2013-15 budget (SB 5530, 2013) in the amount of \$194,000 and the re-establishment of that amount as a one-time General Fund appropriation in the 2015-17 biennium. The funding is a portion of the amount established by policy option package 107 in the agency's 2013-15 budget for the purpose of carrying out Executive Order 12-07 that the agency will not expend during the 2013-2015 biennium and that the grant recipient counties have requested to be moved forward to the 2015-17 biennium to allow additional time for the grant-funded work to be completed.

The Subcommittee approved the appropriation of \$300,000 General Fund to establish a SageCon Coordinator, a limited duration Natural Resource Specialist 5 position, to lead staff participating in the SageCon Governance and Implementation Teams. The position will work closely with and take direction primarily from the Governor's Office to provide overall leadership and direction for state agencies working with public and private stakeholder interests in the energy, agricultural, and conservation sectors.

Department of State Lands

Senate Bill 5507 increases the Federal Funds expenditure limitation in anticipation of an Environmental Protection Agency (EPA) wetlands grant in an amount up to \$133,000. The Department expects notification on the grant in October 2015. The Department of Administrative Services (DAS) is expected to unschedule the limitation until such time as State Lands notifies DAS and the Legislative Fiscal Office that the funds are awarded. There is an additional federal limitation increase for EPA grant carryforward in the amount of \$28,488.

Parks and Recreation Department

Several adjustments are made in the Parks and Recreation Department (OPRD) budget to reflect the June 2015 Parks and Natural Resources (Measure 76) Lottery Funds forecast, an increase of \$3 million over the March 2015 forecast. The distribution is \$300,000 for property acquisition, \$500,000 for facilities maintenance, \$58,314 for direct services, and \$362,326 to satisfy the constitutionally directed 12% to local governments. The remainder of the increase is applied to the ending balance. There is also an increase in Other Funds of \$98,740 in direct services to keep funding and ending balances in proportion with approximate percentages of lottery and other funds expenditures.

A \$970,000 fund shift from Federal Funds to Lottery Funds reimburses OPRD for using M76 Lottery Funds to secure acquisition of the Beltz Farm in 2014-15. A subsequent federal grant frees up the lottery dollars for carry-forward expenditure limitation in park development. The State Historic Preservation Office is provided an increase in Federal Funds expenditure limitation of \$70,425. The limitation will be used to pass through two federal Maritime Heritage grants that local entities have been awarded.

The 2015-17 OPRD budget included \$912,494 non-Measure 76 lottery funds to provide debt service on the Willamette Falls bonding in the 2013-15 budget. The debt service is eliminated as it is not needed; the \$5 million bond request has been satisfied with cash instead.

Other Funds expenditure limitation is increased by \$11,716,805 for three lottery bond-funded purposes. There is no debt service in the 2015-17 biennium as the bonds will not be sold until the Spring of 2017. Debt service in 2017-19 is \$2.2 million non-Measure 76 Lottery Funds.

The Portland Parks and Recreation Department is to receive \$1,500,000 lottery bond proceeds passed through the Parks and Recreation Department for the Renew Forest Park project. The cost of issuance for this project is \$42,071 Other Funds.

The Main Street Revitalization Grant program is funded with \$2,500,000 lottery bond proceeds. OPRD will design, develop, administer, account for, and monitor the new grant program, beginning late in the 2015-17 biennium. Because new positions will be needed to manage the grants, OPRD will need to request funding for them during the 2016 legislative session. The cost of issuance for this bond sale is \$51,972 Other Funds.

Lottery bond proceeds in the amount of \$7,500,000 will be applied to the Willamette Falls Riverwalk project in Oregon City. The cost of issuance is \$122,761 Other Funds.

Water Resources Department

The Subcommittee approved the establishment of Other Funds expenditure limitation for the Water Resources Department for the expenditure of lottery bond proceeds as follows:

- \$2,000,000 one-time Other Funds expenditure limitation for the purpose of making grants and paying the cost of direct services for the qualifying costs of planning studies performed to evaluate the feasibility of developing a water conservation, reuse, or storage project, as described in ORS 541.566, and \$47,477 one-time Other Funds expenditure limitation for the payment of bond issuance costs from Lottery bond proceeds from the Water Conservation, Reuse, and Storage Investment Fund established under ORS 541.576. The bonds are anticipated to be issued at the end of the 2015-17 biennium and, therefore, no debt service expenditures are anticipated in the 2015-17 biennium. The cost of debt service for the 2017-19 biennium is estimated to be \$418,891.
- \$750,000 one-time Other Funds expenditure limitation for the expenditure of Lottery bond proceeds for facilitation of the preparation of place-based integrated water resources strategies as described by Section 2(2) of Senate Bill 266 (2015) from the Water Supply Fund established by Chapter 906, Section 10(1), Oregon Laws 2009. The bonds are anticipated to be issued at the end of the 2015-17 biennium and, therefore, no debt service expenditures are anticipated in the 2015-17 biennium. The cost of debt service for the 2017-19 biennium is estimated to be \$156,831
- \$11,000,000 one-time Other Funds expenditure limitation for the purpose of making grants or entering into contracts to facilitate water supply projects in the Umatilla Basin and for the payment of professional services such as third-party contract administration and quality control contracts related to the projects from the Water Supply Fund established by Chapter 906, Section 10(1), Oregon Laws 2009. The bonds are anticipated to be issued at the end of the 2015-17 biennium and, therefore, no debt service expenditures are anticipated in the 2015-17 biennium. The cost of debt service for the 2017-19 biennium is estimated to be \$2.3 million.
- \$1,000,000 one-time Other Funds expenditure limitation for the purpose of making one or more grants to individuals or entities to repair, replace, or remediate water wells in the Mosier Creek area from the Water Supply Fund established by Chapter 906, Section 10(1), Oregon Laws 2009. The bonds are anticipated to be issued at the end of the 2015-17 biennium and, therefore, no debt service expenditures are anticipated in the 2015-17 biennium. The cost of debt service for the 2017-19 biennium is estimated to be \$190,071.
- \$280,433 one-time Other Funds expenditure limitation for the payment of bond issuance costs for the three items above from the Water Supply Fund established by Chapter 906, Section 10(1), Oregon Laws 2009. The cost of debt service for the 2017-19 biennium is estimated to be \$2.3 million.
- \$6,362,979 one-time Other Funds expenditure limitation for the purpose of carrying out sections 1 to 15 of Chapter 784, Oregon Laws 2013 and the payment of bond issuance costs from the Water Supply Development Fund established under ORS 541.656. Of the total, \$112,979 is for bond issuance costs.

The Subcommittee approved the establishment of \$30,000,000 one-time Other Funds expenditure limitation for the expenditure of general obligation bond proceeds from bonds issued under of Article XI-I (1) for the purposes provided in ORS 541.700 to 541.855 and for the payment of bond issuance costs from the Water Development Loan Fund.

The Subcommittee approved the establishment of Other Funds expenditure limitation in the amount of \$520,000 for bond issuance costs and \$1,201,865 for debt service payments associated with the issuance of bonds issued under of Article XI-I (1) for the purposes provided in ORS 541.700 to 541.855 from the Water Development Loan Administration and Bond Sinking Fund established under ORS 541.830.

The Subcommittee approved a \$200,000 Federal Funds expenditure limitation increase to the Grants program from Pacific Coastal Salmon Recovery Fund (PCSRF) monies to increase the amount of PCSRF funding transferred to the Oregon Department of Fish and Wildlife (ODFW) to a total of \$9,511,859, which is the amount anticipated to be transferred by the Oregon Watershed Enhancement Board to ODFW in Senate Bill 5511, the budget bill for the Oregon Department of Fish and Wildlife. Miscommunication during development of the two agencies' request budgets prevented confirmation of matching amounts.

The Subcommittee also directed the Oregon Watershed Enhancement Board to increase the total amount of Lottery Funds from the Watershed Conservation Grant Fund made for weed grants by \$500,000, on a one-time basis. These additional Grant funds are to be used to improve sage grouse habitat through landowner actions to inventory, treat, and reduce plant invasive species threats to sage grouse habitat and rural economic values and restore native plant habitat. OWEB is directed to work with the Department of Agriculture, local weed boards, and other local delivery mechanisms in getting this additional \$500,000 on the ground improving sage grouse habitat in the shortest time possible.

PUBLIC SAFETY

Department of Corrections

Article XI-Q bonding in the amount of \$14.2 million is included in House Bill 5005 and capital construction expenditure limitation is approved in House Bill 5006. The bonding covers continued work at the Department's backlog of deferred maintenance. Specifically, the funding addresses 25 priority 1, statewide projects. The bonds will be issued in 2017, with debt service beginning in the 2017-19 biennium at \$3.7 million General Fund. This bill includes Other Funds expenditure limitation for cost of issuance in the amount of \$254,568.

Senate Bill 5507 includes a one-time \$400,000 General Fund appropriation to the Department of Administrative Services for a community-based organization, the YWCA of Greater Portland, to administer the Family Preservation Program (FPP) at Coffee Creek Correctional Facility. The program description is in the Department of Administrative Services section of this report.

While the YWCA of Greater Portland will implement the program, the DOC also has a role in the program's success. The following budget note is intended to clarify the DOC role in administering the FPP:

Budget Note:

The Department of Corrections is directed to work with the YWCA to serve the best interests of the children of incarcerated parents by facilitating enriched visitation, parenting education, and family support. Cooperation will include:

- DOC staff assisting in the referral of high-risk offenders to the program and conferring with the Department of Human Services about referral of possible high-risk children,
- Providing adequate program space for twice-monthly therapeutic, face-to-face parent and child visiting sessions for a minimum of three hours per session,
- Facilitating parent-teacher conferences and parent-caregiver communication and visitation, and
- Providing appropriate outcome data to the YWCA.

Criminal Justice Commission

The 2015-17 budget for the Criminal Justice Commission is increased by \$5,000,000 General Fund to enhance the \$35 million General Fund provided for Justice Reinvestment Initiative grants in the agency's budget bill, Senate Bill 5506. This appropriation brings the total available for the program in 2015-17 to \$40 million.

Department of Justice

The Department of Justice generates the majority of its Other Funds revenue from charges to state agencies for legal services. The 2013-15 biennium Attorney General rate was \$159 per hour and generated an estimated \$139.1 million. The 2015-17 Attorney General rate for the legislatively adopted budget is \$175 and is estimated to generate \$153.3 million. This is a \$14.2 million increase (10.2 percent). The change to the Legal Services rate in agency budgets is addressed as part of this measure.

The Subcommittee approved funding for the second "execution phase" (design, construction, testing, and implementation) of the agency's child support information technology replacement project (Child Support Enforcement Automated System, or CSEAS). While the project is still in the latter stages of the initial planning phase, the agency plans to move into the execution phase of the project during the 2015-17 biennium. Application system source code, database design documentation, system documentation, and other necessary artifacts from California, Michigan, and New Jersey will be acquired to facilitate the development of the new system. The project will also begin requirements validation and conduct Joint Application and Joint Technical Design sessions prior to the designing of the new system. The project will then work on the system design and construction of the new system, including data conversion and migration planning, and eventually application testing and implementation.

However, because the agency has not completed all required planning phase activities and documentation, and because it has not received Stage Gate #3 Office of the State Chief Information Officer endorsement of its foundational project management documentation (including a readiness and ability assessment), the execution phase of the project cannot actually begin until the agency first satisfactorily completes all remaining planning phase activities, including the completion of all the Joint Committee on Ways and Means – Information Technology Subcommittee recommendations for the CSEAS project (see below). Until these funding conditions are met, almost all "execution phase" funding will remain uncommitted (see below direction that funds be uncommitted).

The Subcommittee approved \$15,209,670 of Other Funds expenditure limitation for project costs, which is to be financed with Article XI-Q bonds approved in House Bill 5005. The Subcommittee also approved \$29,997,991 Federal Funds expenditure limitation and the establishment of 22 permanent full-time positions (21.13 FTE). This includes personal services of \$3.6 million and services and supplies of \$41.8 million. The amount for services and supplies includes \$35.3 million total funds of contractor payments for: project management, including organization change management services; implementation; independent quality assurance; and independent verification and validation.

Project revenues also include an estimated \$2.9 million in bond proceeds that were authorized and issued during the 2013-15 biennium but remained unexpended. Associated Other Funds expenditure limitation, which was not part of the agency's request, may be requested at a future date.

The Department of Administrative Services is expected to uncommit \$10.7 million of Other Funds expenditure limitation and \$20.8 million

Federal Funds expenditure limitation that may be scheduled based upon the joint approval of the Office of the State Chief Information Officer and the Legislative Fiscal Office. The agency is to submit a report on its compliance, as part of a request to schedule funds, with the Joint Committee on Ways and Means – Information Technology Subcommittee recommendations for the CSEAS project (see below) as well as submit a rebaselined budget for the project.

The Department of Administrative Services is requested to establish a new Summary Cross Reference in the Oregon Budget Information Tracking System for the Child Support Enforcement Automated System program in order to segregate all project costs from the Child Support Division and other Division's operating costs.

Unless otherwise approved by the Legislature or the Emergency Board, the positions budgeted for the project are established as permanent full-time positions under the following conditions: (a) the positions will be abolished on or before the completion of the project; (b) the positions are to remain in the CSEAS program (i.e., CSEAS summary cross reference) and may not be transferred to any other program or used for any other purpose other than the development to the CSEAS project; and (c) the positions may not be included in any permanent finance plan action.

Other Funds expenditure limitation of \$205,330 is included for the cost of issuance of the bonds.

The Subcommittee appropriated \$2,407,587 in additional General Fund Debt Service to support repayment of Article XI-Q General Obligation bond proceeds approved in House Bill 5005.

The Subcommittee adopted the Joint Committee on Ways and Means – Information Technology Subcommittee recommendation for the CSEAS project:

- Work with the Office of the State Chief Information Officer (OSCIO) and LFO to finalize a corresponding incremental funding release plan that is based upon completing all remaining foundational documentation deficiencies and stage gate 2 and 3 requirements.
- Regularly report project status to the OSCIO and LFO throughout the project's lifecycle.
- Continue to follow the Joint State CIO/LFO Stage Gate Review Process.
- Utilize a qualified project manager with experience in planning and managing programs and projects of this type, scope, and magnitude.
- Work with the OSCIO to obtain independent quality management services. The contractor shall conduct an initial risk assessment and respond to DOJ feedback, perform quality control reviews on the key CSEAS Project deliverables including the business case, individual cost benefit/alternatives analysis documents, and foundational project management documents as appropriate, and perform ongoing, independent quality management services as directed by the OSCIO.
- Provide both OSCIO and LFO with copies of all QA vendor deliverables.
- Submit the updated detailed business case, all project management documents, initial risk assessment, and quality control reviews to the OSCIO and LFO for stage gate review.
- Work with OSCIO and LFO to conduct a formal readiness/ability assessment at stage gate 3 to validate readiness and ability to proceed to the execution phase of the project.
- Utilize the Office of the State CIO's Enterprise Project and Portfolio Management (PPM) System as it is deployed for all project review, approval, and project status and QA reporting activities throughout the life of the CSEAS Project. Legislative approval to proceed with the

CSEAS Project will be dependent upon OSCIO and LFO concurrence that DOJ is both ready and able to initiate project execution activities.

The Subcommittee established a \$2 million General Fund special purpose appropriation to the Emergency Board for the Defense of Criminal Convictions as a contingency for potential caseload increases.

The Subcommittee also appropriated \$240,550 General Fund to support the Oregon Crime Victims Law Center. This will bring total funding for the program to \$367,800 for the biennium, including \$77,250 General Fund of existing General Fund and \$50,000 Other Funds from the renewal of a state grant.

Oregon Military Department

Senate Bill 5507 includes \$89,563 General Fund and \$358,253 Federal Funds expenditure limitation for three permanent full-time federal operations and maintenance (FOMA) positions (3.00 FTE). These are 3 of 8 positions eliminated from the Portland Air National Guard (PANG) base in 2009 budget cuts, which brought the FOMA workforce to 18, of 26 National Guard authorized positions. In 2013 the Legislature restored the 8 positions as Limited Duration (LD). This funding restores 3 of the LD positions as permanent. The National Guard pays 80% of the cost, General Fund covers the rest. The restored positions will maintain liquid jet fuel receiving, storage, and distribution for all 21 F-15's at PANG; maintain pesticide and herbicide certifications to keep grassy areas in compliance with Port of Portland mandated wildlife standards, which are meant to deter birds from the airfield; and maintain HVAC systems for climate control of critical communications equipment, as well as base fire alarm systems.

Also included is \$250,000 one-time General Fund for the Oregon Military Museum for creation of exhibits and other capital expenditures directly related to the establishment and maintenance of the museum.

Two projects are approved for Article XI-Q bonding (House Bill 5005) and capital construction expenditure limitation (House Bill 5006). The first project is a new Joint Forces Headquarters facility to be located in Salem. Two-thirds of the total bonds will be sold in 2016 and the remainder in 2017. Debt Service in 2015-17 is approved in this bill at \$434,833 General Fund. Second is expansion of the Oregon Youth Challenge Armory in Bend. Those bonds will be issued in 2017, with debt service beginning in the 2017-19 biennium. Cost of issuance is \$153,000 for the two projects; expenditure limitation is included in this bill. Debt service for the two projects in 2017-19 is \$2.3 million General Fund.

Department of State Police

The Subcommittee increased the Other Funds expenditure limitation in the Fish and Wildlife Enforcement Division by \$993,640 for capital equipment replacements costs. Expenditure limitation is increased by \$78,830 Other Funds in the Administrative, Agency Support, Criminal Justice Information systems, and Office of the State Fire Marshal Other Funds limitation to pay for costs associated with reclassifying fourteen positions in the Firearms Background Check program to better address complexity and volume of firearm background checks.

Measure 76 Lottery Funds for Fish and Wildlife Enforcement are increased by \$278,788 for fish and wildlife enforcement. Fish and Wildlife troopers are reduced by (0.50) FTE due to the phase-in of one position approved for patrolling the Columbia River late in the 2015-17 biennium.

The Subcommittee approved nine position reclassifications in the Forensic Services division and one position reclassification in the Administrative Services division. These position reclassifications will better address workload issues associated with evidence handling and chain of custody in the laboratories, will properly align workload and responsibilities in the Administrative Services division, and do not require additional expenditure limitation to accomplish.

Federal Funds expenditure limitation is increased by \$1,163 in the administrative services, agency support, criminal justice information services, and the office of the State Fire Marshal to balance expenditures to federal grant revenues.

Oregon Youth Authority

Article XI-Q bond issuance totaling \$49 million for the 10-Year Strategic Facilities Plan is approved in House Bill 5005. House Bill 5006 authorizes Other Funds capital construction expenditure limitation in the same amount. \$33 million of the bonds will be sold in 2016 and the rest in 2017. General Fund Debt Service in 2015-17 is \$3,115,428, approved in this bill. Other Funds expenditure limitation in the amount of \$1,055,565 for cost of issuance expense is also included in this bill. Debt Service in 2017-19 will be \$8.6 million.

A \$1 placeholder for Federal Funds Debt Service Nonlimited is added; it was not included in the agency's budget report. The dollar acts as a base in the event the state needed to issue taxable bonds. If such bonds were issued, the federal Build America Bonds program could offset part of the additional associated interest costs.

TRANSPORTATION

Department of Aviation

The Subcommittee approved the move of 0.20 FTE from the Operations program to the Search and Rescue program in the Department of Aviation. This shift aligns staff and resources in the Search and Rescue program. Other Funds expenditure limitation is reduced by \$22,537 in the Operations Division and is increased in the Search and Rescue Division in the same amount.

Department of Transportation

The Subcommittee approved the increase of \$130,000 General Fund for the Oregon Department of Transportation's Seniors and People with Disabilities Transportation Program; the funding is part of a commitment to spending on senior programs that originated in the 2013 special session. This program distributes funds to counties, transit districts, and tribes that provide transportation services for older adults and people with disabilities.

The Subcommittee approved an increase in Other Funds expenditure limitation in ODOT's Transportation Program Development section of \$45,000,000 in lottery bond proceeds for ConnectOregon VI. In addition, the limitation is increased by \$653,540 for cost of issuance expenses. There is no debt service in the 2015-17 biennium as the bonds will not be sold until the Spring of 2017. Debt service in 2015-17 is \$8,317,100 Lottery Funds.

Other Funds expenditure limitation is increased in the Rail Division by \$10,000,000 for lottery bond proceeds for the Coos Bay Rail line. In addition, the limitation is increased by \$226,194 for cost of issuance expenses. There is no debt service in the 2015-17 biennium as the bonds will not be sold until the Spring of 2017. Debt service in 2017-19 is \$1,865,288 Lottery Funds.

The Subcommittee approved an Other Funds expenditure limitation of \$475,000 for cost of issuance of \$35,000,000 in General Obligation bonds for seven highway safety improvement projects. There is no debt service in the 2015-17 biennium as the bonds will not be sold until the Spring of 2017. Debt service in 2017-19 is \$5,135,799 General Fund.

The measure gives approval to the agency to move four positions (4.00 FTE) from the Information Services Branch to the Procurement Branch within ODOT's Central Services Division to align purchasing functions agency-wide.

Adjustments to 2013-15 Budgets

Oregon Health Authority

Other Funds expenditure limitation for the Public Employees' Benefit Board for the 2013-15 biennium was increased by \$45 million. This will allow the agency to pay premiums and claims costs for the rest of the biennium.

Department of Land Conservation and Development

The Subcommittee approved the reduction of the General Fund appropriation made to the Department of Land Conservation and Development for the Southern Oregon Regional Pilot Program (SORPP) in the agency's 2013-15 budget (Senate Bill 5530, 2013) in the amount of \$194,000 and the re-establishment of that amount as a one-time General Fund appropriation in the 2015-17 budget. The funding is a portion of the amount established by policy option package 107 in the agency's 2013-15 budget for the purpose of carrying out Executive Order 12-07 that the agency will not expend during the 2013-15 biennium and that the grant recipient counties have requested to be moved forward to the 2015-17 biennium to allow additional time for the grant-funded work to be completed.

Commission on Judicial Fitness and Disability

The Subcommittee transferred \$5,000 of General Fund from administration to extraordinary expenses in the 2013-15 biennium budget, to fund costs directly associated with the investigation of complaints and the prosecution of cases.

BUDGET REPORT AND MEASURE SUMMARY

CARRIER: Sen. Shields

Joint Committee On Ways and Means

Action: Do Pass The B-Eng Bill.

Action Date: 06/23/15

Vote:

Senate

Yeas: 11 - Burdick, Devlin, Girod, Hansell, Johnson, Monroe, Roblan, Shields, Steiner Hayward, Thomsen, Winters

Nays: 1 - Whitsett

House

Yeas: 9 - Buckley, Gomberg, Huffman, Komp, Nathanson, Rayfield, Read, Whisnant, Williamson

Nays: 1 - Whitsett

Exc: 2 - McLane, Smith

Prepared By: Art Ayre, Department of Administrative Services

Reviewed By: Linda Gilbert, Legislative Fiscal Office

Agency: Higher Education Coordinating Commission

Biennium: 2015-17

Budget Summary*

	2013-15 Legislatively Approved Budget ⁽¹⁾	2015-17 Current Service Level	2015-17 Committee Recommendation	Committee Change from 2013-15 Leg. Approved	
				\$ Change	% Change
General Fund	\$ -	\$ -	\$ 250,431	\$ 250,431	
Total	\$ -	\$ -	\$ 250,431	\$ 250,431	

Position Summary

Authorized Positions	0	0	0	0	
Full-time Equivalent (FTE) positions	0.00	0.00	0.00	0.00	

⁽¹⁾ Includes adjustments through December 2014

* Excludes Capital Construction expenditures

Revenue Summary

House Bill 2002 provides \$250,431 General Fund revenue for the purposes identified in this bill.

Summary of Public Safety Subcommittee Action

Public University Statewide Programs – 025

House Bill 2002 requires law enforcement agencies to have written policies and procedures prohibiting profiling by January 1, 2016. The measure requires that law enforcement agencies provide copies of profiling complaints to the Law Enforcement Contacts Policy and Data Review Committee (LECC), established in ORS 131.906. The LECC is directed to receive complaints from the public and law enforcement agencies, and forward any profiling complaints from the public to the appropriate law enforcement agency.

The Subcommittee approved \$250,431 General Fund for the Higher Education Coordinating Commission, public university statewide programs. The funding will be used for the Criminal Justice Policy Research Institute at Portland State University to support the LECC in carrying out the provisions of House Bill 2002.

The funding in House Bill 2002 is for the LECC to conduct the duties of House Bill 2002, plus provide training and research capacity similar to prior biennia. The funding supports one full-time project manager, one part-time faculty, and one graduate student. Additionally, the funding includes establishing a training curriculum for law enforcement for both in-person and online training, as well as a state-wide mailed survey of public perceptions.

DETAIL OF JOINT COMMITTEE ON WAYS AND MEANS ACTION

HB 2002-B

Higher Education Coordinating Commission

Art Ayre - 503-378-3108

DESCRIPTION	GENERAL FUND	LOTTERY FUNDS	OTHER FUNDS		FEDERAL FUNDS		TOTAL ALL FUNDS	POS	FTE
			LIMITED	NONLIMITED	LIMITED	NONLIMITED			
<u>SUBCOMMITTEE RECOMMENDATION</u>									
SCR 025 - Public University Statewide Programs									
Special Payments	\$ 250,431	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	250,431	
<hr/>									
\$ TOTAL SUBCOMMITTEE RECOMMENDATION	\$ 250,431	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	250,431	

BUDGET REPORT AND MEASURE SUMMARY

CARRIER: Sen. Roblan

Joint Committee On Ways and Means

Action: Do Pass The A-Eng Bill.

Action Date: 06/23/15

Vote:

Senate

Yeas: 12 - Burdick, Devlin, Girod, Hansell, Johnson, Monroe, Roblan, Shields, Steiner Hayward, Thomsen, Whitsett, Winters

House

Yeas: 10 - Buckley, Gomberg, Huffman, Komp, Nathanson, Rayfield, Read, Whisnant, Whitsett, Williamson

Exc: 2 - McLane, Smith

Prepared By: Cathleen Connolly, Department of Administrative Services

Reviewed By: Tim Walker, Legislative Fiscal Office

Agencies: Higher Education Coordinating Committee; Department of Agriculture

Biennium: 2015-17

Budget Summary

	2013-15 Legislatively Approved Budget	2015-17 Current Service Level	2015-17 Committee Recommendation	Committee Change from 2013-15 Leg. Approved	
				\$ Change	% Change
<u>Higher Education Coordinating Commission</u>					
General Fund	\$ -	\$ -	\$ 500,000	\$ 500,000	100.0%
Total	\$ -	\$ -	\$ 500,000	\$ 500,000	100.0%
<u>Department of Agriculture</u>					
General Fund	\$ -	\$ -	\$ 125,000	\$ 125,000	100.0%
Total	\$ -	\$ -	\$ 125,000	\$ 125,000	100.0%

Position Summary

Authorized Positions	0	0	0	0
Full-time Equivalent (FTE) positions	0.00	0.00	0.00	0.00

Revenue Summary

House Bill 2209 appropriates \$500,000 General Fund to the Higher Education Coordinating Commission (HECC) to be used by Oregon State University to fund research activities related to shellfish at the Whiskey Creek Shellfish Hatchery and Hatfield Marine Science Center. House Bill 2209 also appropriates \$125,000 to the Oregon Department of Agriculture (ODA) to conduct a pilot project focused on water quality monitoring in Tillamook Bay. This funding, for HECC and ODA, is to be phased out in the 2017-19 biennial budget.

Summary of Natural Resources Subcommittee Action

House Bill 2209 establishes an eleven-member Task Force on Shellfish to study efforts required to restore and expand shellfish resources. The Task Force is directed to produce a draft Oregon Shellfish Initiative outlining priorities and implementation strategies to enhance shellfish production. The Legislative Administration Committee will provide staff support to the Task Force, and the Task Force sunsets on December 31, 2016.

House Bill 2209 requires ODA to conduct a pilot project on water quality in Tillamook Bay, and requires Oregon State University to conduct research activities related to shellfish, specifically monitoring the effect of ocean acidification at the Whiskey Creek Shellfish Hatchery and conducting the Molluscan Broodstock Program at the Hatfield Marine Science Center.

DETAIL OF JOINT COMMITTEE ON WAYS AND MEANS ACTION

HB 2209-A

Higher Education Coordinating Committee
 Department of Agriculture
 Cathleen Connolly - 503-373-0083

DESCRIPTION	GENERAL FUND	LOTTERY FUNDS	OTHER FUNDS		FEDERAL FUNDS		TOTAL ALL FUNDS	POS	FTE
			LIMITED	NONLIMITED	LIMITED	NONLIMITED			
Higher Education Coordinating Commission									
<u>SUBCOMMITTEE RECOMMENDATION</u>									
SCR 025-000									
Special Payment - Account 6085	\$ 500,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 500,000		
TOTAL SUBCOMMITTEE RECOMMENDATION	\$ 500,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 500,000	0	0.00
Department of Agriculture									
<u>SUBCOMMITTEE RECOMMENDATION</u>									
SCR 021-01									
Personal Services	\$ 16,920	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 16,920	0	0.00
Services and Supplies	\$ 88,080	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 88,080		
Capital Outlay	\$ 20,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 20,000		
TOTAL SUBCOMMITTEE RECOMMENDATION	\$ 125,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 125,000	0	0.00

BUDGET REPORT AND MEASURE SUMMARY

CARRIER: Sen. Hansell

Joint Committee On Ways and Means

Action: Do Pass The B-Eng Bill.

Action Date: 06/05/15

Vote:

Senate

Yeas: 11 - Burdick, Devlin, Girod, Hansell, Johnson, Monroe, President Courtney, Roblan, Shields, Steiner Hayward, Whitsett

Exc: 2 - Thomsen, Winters

House

Yeas: 11 - Buckley, Gomberg, Huffman, Komp, McLane, Nathanson, Rayfield, Read, Whisnant, Whitsett, Williamson

Exc: 1 - Smith

Prepared By: Dustin Ball, Department of Administrative Services

Reviewed By: Steve Bender, Legislative Fiscal Office

Agencies: Oregon Business Development Department; Higher Education Coordinating Commission

Biennium: 2015-17

Budget Summary*

<u>Oregon Business Development Department</u> Lottery Funds Total	2013-15 Legislatively Approved Budget ⁽¹⁾	2015-17 Current Service Level	2015-17 Committee Recommendation	Committee Change from 2013-15 Leg. Approved	
				\$ Change	% Change
	\$ -	\$ -	\$ 800,000	\$ 800,000	100.0%
<u>Higher Education Coordinating Commission</u> General Fund Total	\$ -	\$ -	\$ 800,000	\$ 800,000	100.0%
	\$ -	\$ -	\$ 100,000	\$ Change	% Change
(1) Includes adjustments through December 2014 * Excludes Capital Construction expenditures	\$ -	\$ -	\$ 100,000	\$ 100,000	100.0%
	\$ -	\$ -	\$ 100,000	\$ 100,000	100.0%

Revenue Summary

House Bill 2998 is funded with a one-time Lottery Funds allocation to the Oregon Business Development Department (OBDD) and a one-time General Fund appropriation to the Higher Education Coordinating Commission (HECC). The bill has no long-term impacts on the revenues of OBDD or HECC. The allocation of Lottery Funds to OBDD will be included in the total amount of Lottery Funds that House Bill 5029 will allocate from the Administrative Services Economic Development Fund to OBDD for business, innovation and trade.

Summary of Transportation and Economic Development Subcommittee Action

House Bill 2998 requires OBDD to support and provide technical assistance for the harvesting of western juniper and the manufacturing of products from western juniper, and requires the Institute for Natural Resources to identify and map high quality marketable stands of western juniper. Western juniper grows across more than six million acres of central and eastern Oregon, with the majority of area forested by juniper being split between Bureau of Land Management and privately owned lands. Western juniper in Oregon has increased dramatically since the 1930's due to land management decisions, notably wildfire suppression. Juniper expansion affects plant communities, water availability, fire cycles, forage production and wildlife habitat and biodiversity.

Oregon Business Development Department

House Bill 2998 establishes a one-time \$800,000 Lottery Funds expenditure limitation for OBDD in the Business, Innovation, Trade Division, to support the harvesting of western juniper and the manufacturing of products from western juniper allocated as follows: (1) \$500,000 for providing economic development assistance as either loans or grants to persons engaged in the business of western juniper harvesting or of manufacturing products from western juniper, (2) \$200,000 for making technical business assistance available to persons engaged in the business of western juniper harvesting or of manufacturing products from western juniper, (3) \$100,000 for workforce training assistance to persons engaged in the business of western juniper harvesting or of manufacturing products from western juniper.

Higher Education Coordinating Commission

The bill requires the Institute for Natural Resources, in consultation with the Oregon Department of Forestry, the Oregon Department of Agriculture and the Oregon Department of Fish and Wildlife and other interested parties, to identify and map high quality marketable stands of western juniper that can be harvested in a commercially and environmentally reasonable manner for use in marketing. The bill provides a one-time \$100,000 General Fund appropriation to the HECC to finance the mapping of marketable western juniper stands by the Institute for Natural Resources at Portland State University.

DETAIL OF JOINT COMMITTEE ON WAYS AND MEANS ACTION

HB 2998-B

Oregon Business Development Department
 Dustin Ball -- 503-378-3119
 Higher Education Coordinating Commission
 Bill McGee -- 503-378-2078

DESCRIPTION	GENERAL FUND	LOTTERY FUNDS	OTHER FUNDS		FEDERAL FUNDS		TOTAL ALL FUNDS	POS	FTE
			LIMITED	NONLIMITED	LIMITED	NONLIMITED			
<u>SUBCOMMITTEE RECOMMENDATION</u>									
<u>Oregon Business Development Department</u>									
SCR 210 - Business, Innovation, Trade									
Special Payments	\$ -	\$ 800,000	\$ -	\$ -	\$ -	\$ -	\$ 800,000		
 <u>Higher Education Coordinating Commission</u>									
SCR 025 - PU State Programs									
Special Payments	\$ 100,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 100,000		
SUBCOMMITTEE RECOMMENDATION	\$ 100,000	\$ 800,000	\$ -	\$ -	\$ -	\$ -	\$ 900,000	0	0.00

BUDGET REPORT AND MEASURE SUMMARY

CARRIER: Rep. Rayfield

Joint Committee On Ways and Means

Action: Do Pass As Amended And Be Printed Engrossed.

Action Date: 07/01/15

Vote:

House

Yeas: 12 - Buckley, Gomberg, Huffman, Komp, McLane, Nathanson, Rayfield, Read, Smith, Whisnant, Whitsett, Williamson

Senate

Yeas: 11 - Burdick, Devlin, Girod, Johnson, Monroe, Roblan, Shields, Steiner Hayward, Thomsen, Whitsett, Winters

Exc: 1 - Hansell

Prepared By: Cathleen Connolly, Department of Administrative Services

Reviewed By: Tim Walker, Legislative Fiscal Office

Agency: Higher Education Coordinating Commission

Biennium: 2015-17

Budget Summary

	2013-15 Legislatively Approved Budget	2015-17 Current Service Level	2015-17 Committee Recommendation	Committee Change from 2013-15 Leg. Approved	
				\$ Change	% Change
General Fund	\$ -	\$ -	\$ 108,907	\$ 108,907	100.0%
Total	\$ -	\$ -	\$ 108,907	\$ 108,907	100.0%

Position Summary

Authorized Positions	0	0	0	0
Full-time Equivalent (FTE) positions	0.00	0.00	0.00	0.00

Revenue Summary

Senate Bill 202 appropriates \$108,907 General Fund to the Higher Education Coordinating Commission to be distributed to Oregon State University to be used for the purposes of the Institute of Natural Resources to carry out the provisions of the bill. This funding is to be phased out in the 2017-19 biennial budget.

Summary of Natural Resources Subcommittee Action

Senate Bill 202 establishes a Task Force on Independent Scientific Review for Natural Resources which will have 15 members appointed by the Governor from certain sectors and universities. The Task Force is to assess the need for independent scientific review in Oregon and make recommendations regarding which entities should conduct or coordinate scientific review across the broad range of natural resource issues. The Task Force is to ensure that the entity recommended will provide scientific review that is independent. The Task Force also makes recommendations regarding structure and process that will be used during scientific review. The Task Force is to submit a report of its findings and recommendations to the Governor and the Legislature by September 15, 2016. The Institute for Natural Resources will staff the Task Force. The Task Force will sunset on January 2, 2019. The bill also abolishes the Independent Multidisciplinary Science Team on January 1, 2017.

DETAIL OF JOINT COMMITTEE ON WAYS AND MEANS ACTION

SB 202-C

Higher Education Coordinating Commission
 Cathleen Connolly - 503-373-0083

DESCRIPTION	GENERAL FUND	LOTTERY FUNDS	OTHER FUNDS		FEDERAL FUNDS		TOTAL ALL FUNDS	POS	FTE
			LIMITED	NONLIMITED	LIMITED	NONLIMITED			
SUBCOMMITTEE RECOMMENDATION									
SCR 025-00									
Special Payment - Account 6085	\$ 108,907	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 108,907		
TOTAL SUBCOMMITTEE RECOMMENDATION	\$ 108,907	\$ -	\$ -	\$ -	\$ -	\$ -	108,907	0	0.00

BUDGET REPORT AND MEASURE SUMMARY

CARRIER: Rep. Huffman

Joint Committee On Ways and Means

Action: Do Pass.

Action Date: 06/23/15

Vote:

House

Yeas: 9 - Buckley, Gomberg, Huffman, Komp, Nathanson, Rayfield, Read, Whisnant, Williamson

Nays: 1 - Whitsett

Exc: 2 - McLane, Smith

Senate

Yeas: 9 - Devlin, Hansell, Johnson, Monroe, Roblan, Shields, Steiner Hayward, Whitsett, Winters

Nays: 2 - Girod, Thomsen

Exc: 1 - Burdick

Prepared By: Bill McGee, Department of Administrative Services

Reviewed By: Krista McDowell, Legislative Fiscal Office

Agency: Higher Education Coordinating Commission

Biennium: 2015-17

Budget Summary*

	2013-15 Legislatively Approved Budget⁽¹⁾	2015-17 Current Service Level	2015-17 Committee Recommendation	Committee Change from 2013-15 Leg. Approved	
				<u>\$ Change</u>	<u>% Change</u>
General Fund	<u>\$ -</u>	<u>\$ -</u>	<u>\$ 427,500</u>	<u>\$ 427,500</u>	<u>100.0%</u>

Position Summary

Authorized Positions	0	0	0	0
Full-time Equivalent (FTE) positions	0.00	0.00	0.00	0.00

⁽¹⁾ Includes adjustments through December 2014

* Excludes Capital Construction expenditures

Revenue Summary

Senate Bill 860 includes a \$427,500 General Fund appropriation to the Higher Education Coordinating Commission.

Summary of Education Subcommittee Action

Senate Bill 860 requires the Higher Education Coordinating Commission (HECC) to solicit applications from public universities to participate in a career advising and mentorship pilot program. The bill specifies criteria for selecting two universities to participate in the pilot program, including the requirement that one selected university have less than 10,000 enrolled undergraduate students, and that the other have 10,000 or more undergraduate students. HECC and the selected universities are required to present a final program framework and implementation plan during the 2016 Legislative Session and to submit progress reports on results of the program during the 2017 session.

The bill appropriates \$427,500 General Fund to HECC to implement provisions of the bill. From this amount, the two universities will each receive funding to hire Student Career Advising and Mentorship Coordinators, equivalent to one full-time position, to design and develop the pilot program through the university's academic advising center, career services center, and alumni network or alumni foundations. Funding for position at the large university is estimated to cost \$300,000 per biennium and \$270,000 per biennium at the small university. These amounts include \$15,000 Services and Supplies costs, per year, for each position for travel related expenses, as these positions will be traveling both in-state and internationally to work with alumni organizations, foundations, and industry to fully coordinate mentorship and internship opportunities for student participants. Given that the two universities should be selected for the pilot program by January 1, 2016; appropriations for the 2015-17 biennium only include a year and half of university salary estimates. The fiscal impact to the HECC to administer the program is anticipated to be minimal and absorbable within the agency's budget. Existing staff will select institutions and co-present on program framework, implementation plans and the progress of the pilot programs to the Legislative Assembly.

DETAIL OF JOINT COMMITTEE ON WAYS AND MEANS ACTION

SB 860-B

Higher Education Coordinating Commission
 Bill McGee 503-378-2078

DESCRIPTION	GENERAL FUND	LOTTERY FUNDS					TOTAL ALL FUNDS	POS	FTE
			LIMITED	NONLIMITED	LIMITED	NONLIMITED			
OTHER FUNDS									
<u>SUBCOMMITTEE RECOMMENDATION</u>									
SCR 021 Public University Support Fund	\$ 427,500	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
427,500 Special Payments: Other Special Payments									
TOTAL SUBCOMMITTEE RECOMMENDATION	\$ 427,500	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 427,500	0	0.00
<u>SUBCOMMITTEE RECOMMENDATION</u>									
SCR 021 Public University Support Fund	\$ 427,500	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 427,500		
Special Payments: Other Special Payments									
TOTAL SUBCOMMITTEE RECOMMENDATION	\$ 427,500	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 427,500	0	0.00

HIGHER
EDUCATION
COORDINATING
COMMISSION

