
Docket Item:

Office of Research and Data: Final report on SB 113 Employment Data Collection and Reporting for Community Colleges and Universities.

Summary:

This report is the last of the three reports required from SB 113 regarding data for employees at Oregon's public colleges and universities. In November of 2015 a report was submitted regarding Section 3 of the bill with a look-back for employment data from 2010 to present; and in February of 2016, the second report was submitted for Section 5 regarding the healthcare benefit eligibility for part-time faculty.

This report is in response to Section 1 of the bill and charges HECC with addressing the following:

1. A determination of the most appropriate method for public institutions to report relevant employment data for the following employee categories:
 - a) Full-time faculty;
 - b) Part-time faculty;
 - c) Graduate faculty;
 - d) Full-time classified employees;
 - e) Part-time classified employees;
 - f) Full-time nonteaching professional staff;
 - g) Part-time nonteaching professional staff;
 - h) Full-time supervisory employees;
 - i) Part-time supervisory employees;
 - j) Full-time management staff; and
 - k) Part-time management staff.
2. A recommendation for when and how often public institutions should report employment data to HECC.
3. A recommendation for when and how often the HECC should report employment data from public institutions to the Legislative Assembly.

The workgroup concluded that due to the replication of data requested from ORS 350.360 and 350.365 (HB 2152, 2013), SB 113 should be considered a "clean up" bill because nearly all of the information requested in the bill is being provided through two other reports already

statutorily required. The only addition from SB 113 is the request for data on the supervisory category from community colleges. Therefore, SB 113 could be an opportunity to reduce the two separate reports to a single report containing all of the relevant information from both the bill and the statutes.

The consensus of the workgroup was to strike ORS 350.365 and modify ORS 350.360 to include the supervisory category for community colleges and a combination of the data requested from both statutes. The workgroup's recommendations are listed below.

Recommendation #1: SB 113 should modify ORS 350.360 to include the recommendations below and strike 350.365 (HB 2152, 2013)

Recommendation #2: Institutions will provide data to HECC by June 30 of each year
HECC will provide report to Legislature and the Governor's office which is currently required by ORS 350.360, no later than December of each year

Recommendation #3: Relevant data to include for each employee category for full-time and part-time employees:
(combination of ORS 350.360, 350.365 and SB 113):

- Total Number
- Total FTE
- Number that Supervise
- Avg. salary
- Ratio of students to each employee category
- Ratio of instruction among faculty groups
- Number eligible for healthcare/other benefits

Recommendation #4: Employee categories should remain as listed in ORS 350.360

- Administrative/Management
- Faculty, Graduate Assts.
- Classified/Professional Non-teaching

Recommendation #5: Institutions should provide data using the November 1 IPEDS data run.

Recommendation #6: Eliminate the requirement that the HECC provide an opinion regarding improvements to data collection and reporting methods in each report.

Docket Material:

See attached Final Report

Staff Recommendations:

Action item: Review and recommend revisions, with those or absent any revisions approve for submission to the Legislature.



SENATE BILL 113 FINAL REPORT: EMPLOYMENT
DATA COLLECTION AND REPORTING FOR
UNIVERSITIES AND COMMUNITY COLLEGES
IN OREGON

*A report to the Oregon Legislature
December 2016*

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SENATE BILL 113 OVERVIEW AND BACKGROUND

Senate Bill 113 as a whole seeks information regarding employees of Oregon’s community colleges and universities. Specifically, Section 1 requests a recommended methodology for collecting and reporting employment data at Oregon’s universities and community colleges; Section 3 requests summary data such as the number and salaries of employees since 2010; and Section 5 requests information about the calculations that are used to determine whether a part-time faculty member at two or more institutions is eligible for healthcare benefits. The bill requires three reports, two of which have already been submitted. In November of 2015 a report was submitted regarding Section 3 with a look-back for employment data from 2010 to present; and in February of 2016, the second report was submitted for Section 5 regarding the healthcare benefit eligibility for part-time faculty.

This third and final report is prepared in response to Section 1 of the bill which charges the Higher Education Coordinating Commission (HECC) with addressing the following three requests for information:

1. A determination of the most appropriate method for public institutions to report relevant employment data for the following employee categories:
 - a) Full-time faculty;
 - b) Part-time faculty;
 - c) Graduate faculty;
 - d) Full-time classified employees;
 - e) Part-time classified employees;
 - f) Full-time nonteaching professional staff;
 - g) Part-time nonteaching professional staff;
 - h) Full-time supervisory employees;
 - i) Part-time supervisory employees;
 - j) Full-time management staff; and
 - k) Part-time management staff.
2. A recommendation for when and how often public institutions should report employment data to HECC
3. A recommendation for when and how often the HECC should report employment data from public institutions to the Legislative Assembly.

The HECC convened a work group of community college and university representatives as well as members of the Oregon Community College Association and the Service Employees International Union to address the issue of reporting employment data. A list of workgroup members and other participants can be found in Appendix A. The workgroup met in Salem on May 26th and again on October 3rd to discuss the issues requested in Section 1 of the bill and offer recommendations. The biggest challenges for this group were defining which employees belong in the various employment categories outlined in the bill, as well as establishing how SB 113 intersects or duplicates the efforts of ORS 350.360 and 350.365 (HB 2152, 2013) which also seek employment data from the institutions.

The group concluded that due to the replication of data requested, SB 113 should be considered a “clean up” bill because nearly all of the information requested in the bill is being provided through two other reports already statutorily required. The only addition from SB 113 is the request for data on the supervisory category

from community colleges. Therefore, SB 113 could be an opportunity to reduce the two separate reports to a single report containing all of the relevant information from both the bill and the statutes. In combining these requirements, the workgroup determined that relevant data would include the supervisory employee category for community colleges from SB 113, in addition to the data required in ORS 350.360 and 350.365.

Recommendations for specific data to collect are outlined in the next section.

As pursuant to ORS 350.360, universities are currently required to provide data to the HECC on employees who supervise, the university workgroup representatives indicated that this recommendation would not create additional burden. Some community colleges indicated that additional resources may be required to comply with this requirement to either re-program their internal systems to flag employees with supervisory duties, or to run customized queries or conduct manual verifications for these employees. Reported estimates ran from requiring very little extra time or resources to as much as three to four weeks of time. Taken together, the agency's assessment is that adding a single category of data to existing reporting requirements is acceptable. This is the case whether data are tabulated manually each time or through a one-time modification of existing processes.

With regards to the employee categories, although they contain the same employee groupings, SB 113 lists them individually whereas ORS 350.360 and 350.365 combine them in slightly different ways. For example, SB 113 lists Classified separate from Professional non-teaching employees; whereas ORS 350.360 combine them into one category. This combination of employees facilitates easier reporting because they coincide with current reporting standards for the federal data collection system known as IPEDS and would not require modifications to existing data extract processes, which would be needed for reporting individual categories. In order to ensure consistency and ease of reporting, the workgroup recommends retaining the groupings as listed in ORS 350.360.

Also, ORS 350.360 and 350.365 require that some of the data be retrieved specifically from IPEDS; while the source for other data is not specified. SB 113 also does not indicate where the data should come from. Due to the potential for inconsistencies in data reporting across all institutions, the workgroup recommends for SB 113, the institutions should use the data resulting from their annual IPEDS data run in November and provide that directly to the HECC.

Finally, the workgroup's recommendation is to strike ORS 350.365 and amend ORS 350.360 to consolidate both reports into a single one to include all recommended employment data and with data collection at the institutions in November of each year using their standards IPEDS run. These data will then be submitted to the HECC by June, which will then be presented to the Legislature and the Governor's office which is currently required by ORS 350.360. The report will be submitted no later than December.

Senate Bill 113 is the third evolution of the Legislature's attempt to gather employee data from Oregon's public institutions, following HB 2557 in 2009 and HB 2152 in 2013. By including the supervisory employee category for community college employees, the colleges will be brought into alignment with data currently required from universities and will accomplish the bill's goal of providing a comprehensive overview of staffing levels and broad changes in resources allocated to administration at each of Oregon's public institutions. Presenting all of this data in a single report once a year will allow the legislature to more easily access and analyze consistent data across all institutions over time.

The workgroup's recommendations are listed in the next section.

RECOMMENDATIONS

SB 113 Section 1 (2) requires the workgroup to make recommendations to the legislature regarding the timing and manner of reporting employment data. Specifically, the workgroup must recommend:

- 1) when and how often the public universities listed in ORS 352.002 and community colleges should provide relevant employment data to the commission;
- 2) when and how often the commission should provide the data to the Legislative Assembly.

After a thorough discussion, the workgroup puts forth the following recommendations:

Recommendation #1: SB 113 should modify ORS 350.360 to include the recommendations below and strike 350.365 (HB 2152, 2013).

Recommendation #2: Institutions will provide data to the HECC by June 30 of each year. HECC will submit a report to the Legislature and Governor's office no later than December of each year.

Recommendation #3: Relevant data to include for each employee category for full-time and part-time employees:

(combination of ORS 350.360, 350.365 and SB 113):

- Total Number
- Total FTE
- Number that Supervise
- Avg. salary
- Ratio of students to each employee category
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Recommendation #4: Employee categories should remain as listed in ORS 350.360

- Administrative/Management
- Faculty, Graduate Assts.
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Recommendation #5: Institutions should provide data using their November 1 IPEDS data run.

Recommendation #6: Eliminate the requirement that the HECC provide an opinion regarding improvements to data collection and reporting methods in each report.

APPENDIX A

Senate Bill 113 Section 1 Work Group Members

Organization	Name	Title
Oregon Education Association (OEA)	Matt Davies	Chemeketa Community College Faculty
Oregon Education Association (OEA)	Jared Mason Gere	Government Relations Consultant
American Federation of Teachers - Oregon	Marcus Swift	Director of Political and Legislative Affairs
Interinstitutional Faculty Senate	Randy Sullivan	President, University of Oregon Senate
Clackamas Community College	BJ Nicoletti	Director of Institutional Research & Reporting
Blue Mountain Community College	Tammie Parker	Associate Vice President, Human Resources
Chemeketa Community College	Alice Sprague	Director, Human Resources
Oregon State University	Donna Chastain	Director, Workplace Solutions, Office of Human Resources
Oregon Institute of Technology	Tracie Houtz	Associate Director of Human Resources
Southern Oregon University	Chris Stanek	Director of Institutional Research
Portland State University	Kathi Ketcheson	Director and Research Professor, Office of Institutional Research & Planning
Assoc. of OR Faculty	Chris Parta	Consultant
OCCA	John Wykoff	Deputy Director
OCCA	Karen Smith	General Counsel
SEIU	Len Norwitz	
SEIU	Andy Boeger	
HECC	Frank Goulard	HECC Commissioner
HECC	Dana Richardson	Deputy Director, Policy & Legislative Affairs
HECC	Tim Wilson	Office of Research & Data
HECC	Betsy Simpkins	Office of Research & Data
HECC	Vern Mayfield	Office of Research & Data

Other participants include: Senator Michael Dembrow, Farooq Sultan (OIT), Nina DeLange (PSU), Heidi Williams (OEBC), Amy Cox (HECC)

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