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**HECC Strategic Plan Discussion Series**  
*Strategy 5: Affordability*

Background: Between January and August, 2017s, the Commission will engage in a series of discussions designed to prepare for potential revisions to its 2016-2020 Strategic Plan, tentatively scheduled to be considered by the Commission at its August, 2017 meeting. These discussions will provide an opportunity for the Commission to reflect upon the strategies it adopted for the current version of the plan, levers associated with moving the plan forward, and opportunities for potential revisions. Commission staff will identify successes and barriers to completion of the strategies currently within the plan.

At its April meeting, the Commission will focus on strategies contained within the fifth section of the Strategic Plan, which calls for the HECC to limit the cost of higher education for students and their families, with a particular focus on ensuring that students rising through Oregon's preK-12 system may be reasonably certain they will have access to affordable options for higher education. The Strategic Plan notes that while affordability turns out to be surprisingly challenging to measure, "on the whole, students and their families bear a much greater share of the cost of funding their postsecondary educations than they did in previous generations." It commits the Commission to pursuing **five primary strategies related to affordability** (these constitute the five columns in the table below):

1. Developing and reporting annually on a set of affordability measures that can be used to guide policy and measure progress.
2. Supporting innovations that lower student and family cost while maintaining or increasing quality.
3. Increasing state financial aid to the national average per student.
4. Continuing to promote Oregonians' access to the state and federal financial aid system, including through FAFSA and ORSAA completion efforts.
5. Connecting young Oregonians to the promise of affordable higher education.

The Strategic Plan notes that the tools/levers at our disposal for this work are significant, and include the following:

- Developing a biennial, consolidated higher education budget recommendation that establishes needs and sets priorities for institutional funding, scholarship funding, and other higher education funding.
- Approving or disapproving requests from public universities to raise resident undergraduate tuition by more than 5% in a single year.
- Within limits set by the statute, determining who receives the Oregon Opportunity Grant (OOG) and on what basis.

- Operating a variety of scholarship and access programs including the OOG, the Oregon Promise, and privately-funded scholarships administered by the HECC.
- Collecting, analyzing, and publishing student, scholarship, and tuition data.
- Annual evaluations of public universities, which may report on institutional efforts to improve affordability through tuition setting, institutional aid, and increasing student success.
- Convening higher education stakeholders to develop and share best practices for reducing costs.
- Making recommendations for affordability-related programs to the Legislature and Governor.

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	Strategy: Develop Better Affordability Measures	Strategy: Support Innovations that Lower Cost	Strategy: Increase State Financial Aid	Strategy: Promote FAFSA and ORSAA Access	Strategy: Connect Young Oregonians to Affordable Higher Education
<b>HECC Offices*</b>	R&D (lead), OSAC, CCWD, Univ. Coord., PPS	CCWD, Univ. Coordination	OSAC	OSAC	OSAC, CCWD, Univ. Coord., PPS
<b>Partners**</b>	Higher education institutions Research partners	Higher education institutions K-12 school districts ODE, CEo	Higher education institutions Legislature and Governor	K-12 school districts and community partners Higher education institutions	K-12 school districts and community partners Higher education institutions
<b>Measurable Successes</b>	Development of presentation materials that express a more comprehensive view of affordability Estimation of proportion of students facing unaffordable costs	Adoption of standards for expanded forms of accelerated learning Development of Open Educational Resources (OERs) as lower-cost textbooks Developmental Education (DevEd) redesign has resulted in lower DevEd placement rates	Successful launch of Oregon Promise program Prioritization of Oregon Opportunity Grant and Oregon Promise in 2017 Governor's Recommended Budget	Development and implementation of ORSAA Approx. 10% increase in year-over-year FAFSA completion by high school seniors (nation-leading)	Oregon Promise first-year impacts, bringing more HS graduates students directly into higher education

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<b>Activities Underway</b>	Estimation of proportion of students facing unaffordable costs by institution	Continued coordination of Credit for Prior Learning standards and implementation  Working with legislators on potential continuation of OER program	Working with legislators and Governor’s office on continued and expanded funding for state scholarship programs for 2017-19 biennium	FAFSA+ Initiative  Other OSAC-led outreach efforts to high schools, community organizations	Various OSAC-administered scholarship programs.  Continued support for Career Pathways initiatives that link high school courses to community college courses of study.  WIOA youth programs focused on out-of-school youth.
<b>Challenges</b>	Staff capacity has been limited  Linking data on financial aid with data on students  Financial information only available for students who file a FAFSA/ORSAA	The engines of innovation in higher education delivery typically reside at the campus/institutional level. Uncertainty about the HECC’s role	The state budget situation  Constitutional restrictions on race-specific public scholarship criteria inhibit application of Equity Lens	Immigration-related concerns may have a dampening effect on ORSAA completion  Continued funding for FAFSA+ and other outreach efforts	Funding sustainability in order to fulfill commitment to promises.

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<b>Potential Opportunities</b>	We are building much stronger research and analytic capacity within our R&D office	Additional support for competency-based education, including models such as WGU  Working with Legislature and institutions to scale successful practices	Over the long term, to explore federal partnerships to maximize the leverage of the Pell Grant, in combination with state aid	Ensuring that HECC outreach efforts apply an Equity Lens to reach the populations least well-represented in higher education	
<b>Questions for the Commission</b>		With so many potential innovations to support, how do we decide where to place focus?  What should be the HECC's role relative to the future of competency-based education, as described in the current Plan?	Without confidence that state scholarship investments are likely to rise significantly in the near to medium-term, how do what strategies can we employ to continue to make progress?	How can we expand the success of our FAFSA and ORSAA outreach efforts in the current environment?	When funding is not guaranteed/sustainable, what type of "promises" should we make?

\*HECC Offices: Workforce Investment (OWI), Community Colleges and Workforce Development (CCWD), Private Post-Secondary (PPS), University Coordination, Student Access and Completion (OSAC), Research and Data (R&D)  
 \*\*State Agency Partners: Oregon Department of Education (ODE), Chief Education Office (CEdO), Oregon Employment Department, Department of Human Services (DHS), Bureau of Labor and Industries (BOLI)