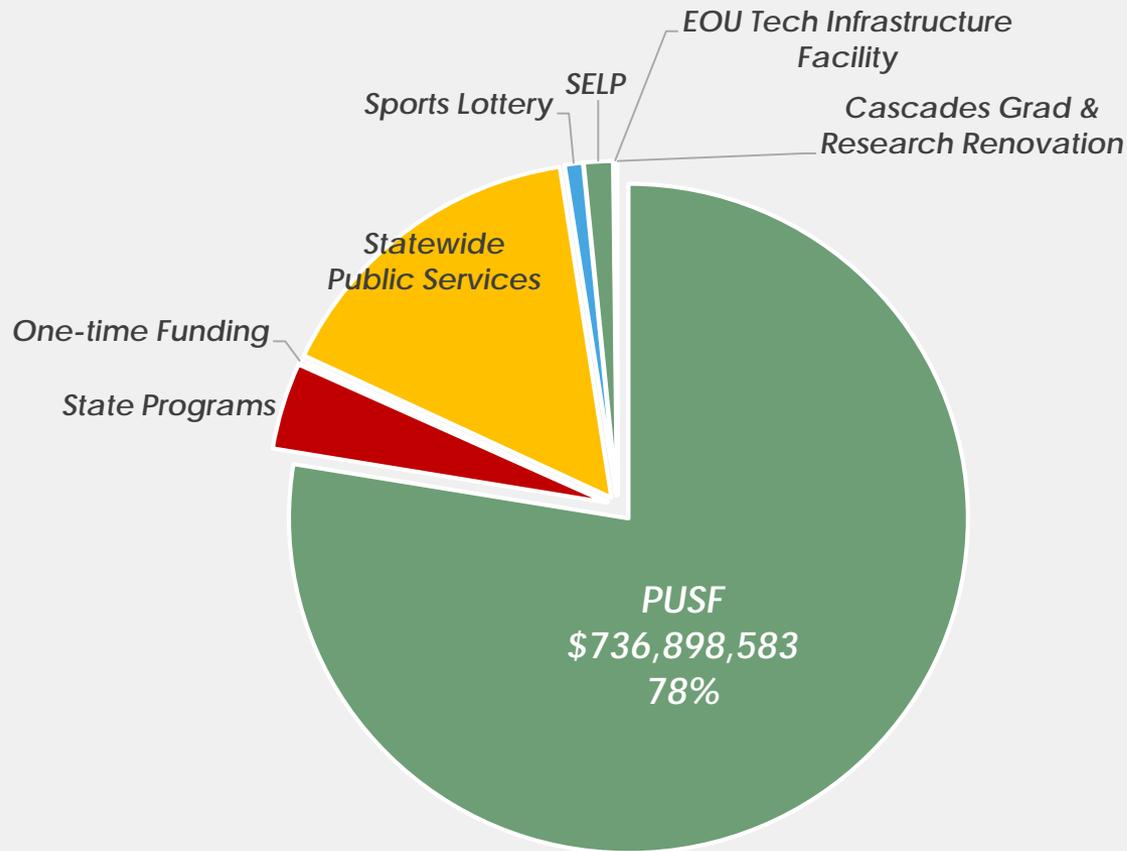


October 12, 2017

# PUBLIC UNIVERSITY SUPPORT FUND OVERVIEW

Andrew Rogers, Director,  
University Coordination,  
University Budget &  
Finance

# 2017-19 PUBLIC UNIVERSITY FUNDING



2017-19 Total Public University Funding **\$1,121,617,063**  
2017-19 Total Public University Funding for distribution **\$936,504,998**

# MISSION DIFFERENTIATION

## Mission Differentiation

“Off the Top” Allocation – MD calculated and deducted from PUSF prior to OBF & SCH allocations

- PUSF levels determine how most MD line items are calculated
  - If the PUSF increase over the prior year > Portland CPI, apply CPI to historical funding.
  - If PUSF increase < Portland CPI apply PUSF % change to historical funding.
- Most Line Items based on historical funding
  - Items in **red font** are calculated based on SCH (Student Credit Hour) completions.



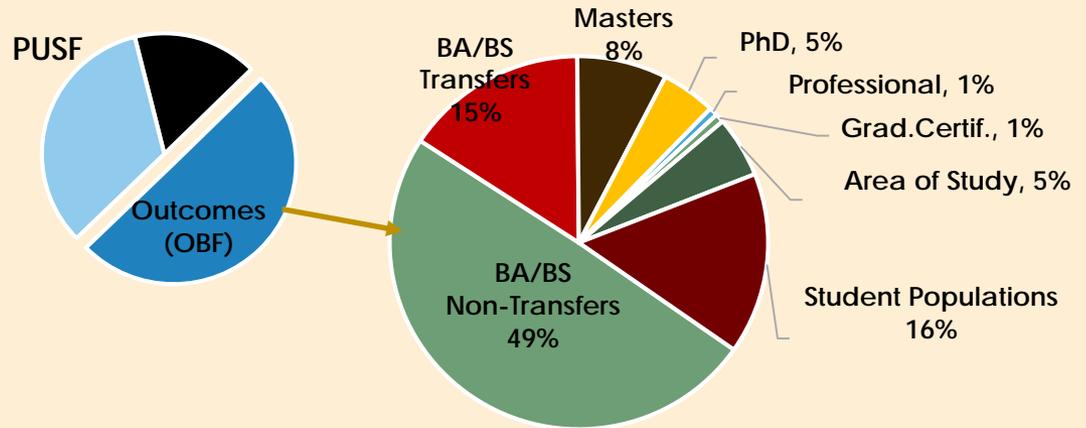
FY 2018 MISSION DIFFERENTIATION FUNDING		
Category	Program	Funding
Mission	Bldg. Maintenance / SWPS	\$1,893,951
	Campus Public Service Programs	\$1,522,147
	Collaborative OUS Nursing Program	\$102,585
	Dual Credit	\$2,697,324
	Engineering Graduate	\$3,066,331
	Engineering Technology Undergraduate	\$1,603,611
	Health Professions Programs	\$3,426,227
	Law & Legal Studies	\$639,490
	OCATE	\$618,508
	OIT AA SCH adjust.	\$212,229
	Oregon Wide-Area Education Network (OWEN)	\$429,191
	Pharmacy	\$1,098,365
	PSU-NEW Leadership Oregon	\$69,471
	PSU-Oregon Biodiversity Information Center	\$52,351
	Regional Solutions	\$55,568
	Rural Access	\$268,553
	Southwestern Oregon University Center (SOUC)	\$119,610
	Statewide Access	\$881,430
Systemwide Expenses / Programs	\$2,225,254	
Vet. Med	\$3,665,707	
Veterinary Diagnostic Lab	\$1,301,044	
Regional Support	Regional Support	\$3,353,812
	EOU Resident Adjust.	\$2,113,119
	IT Fifth Site/OCATE/Southwest Oregon/OWEN	\$2,028,988
	Regional Access	\$1,674,949
	Regional University Support	\$12,152,342
	Retention & Graduation	\$1,688,484
	Retrenchment	\$964,848
	TRU Shared Services	\$6,175,570
Research	Underpinning	\$1,688,484
	Faculty Salaries - Research	\$2,186,844
	Sponsored Research	\$3,959,043
<b>Total Mission Differentiation Funding</b>		<b>\$63,935,430</b>

# OUTCOMES BASED FUNDING (OBF)

## OBF Funding

**Points-based system that compares Resident Degree completions among the institutions**

- Degrees funded based on number transcribed in each recognized CIP Code.
  - Averaged over prior 3-year period
- All degree levels are funded, including graduate certificates.
- Degree points weighted in the following categories to reflect state priorities:
  - Degree Level
    - *Non-Transfer Bachelors-100%*
    - *Transfer Bachelors-62.5%*
    - *Masters-50%*
    - *PhD-70%*
    - *Professional-50%*
    - *Certificates-10%*
  - Cost Weight of Program
  - Area of Study Bonus for high-demand, high-reward areas
  - Additional points awarded for undergraduate degrees earned by students in at least one of the designated targeted populations.



OBF PER DEGREE FUNDING RANGE			
		Undergraduate	Graduate
Low	Value	\$5,126	\$1,025
	Example	<ul style="list-style-type: none"> <li>· Natural Resources, Conservation</li> <li>· Area, Ethnic, Cultural, Gender, Group Studies</li> <li>· Foreign Languages, Literatures, Linguistics</li> <li>· English Language and Literature</li> <li>· Liberal Arts and Sciences, Humanities</li> <li>· Philosophy and Religious Studies</li> <li>· Psychology</li> <li>· Social Sciences and History</li> <li>· History</li> </ul>	Graduate Certificates: <ul style="list-style-type: none"> <li>· Natural Resources, Conservation</li> <li>· Area, Ethnic, Cultural, Gender, Group Studies</li> <li>· Education</li> <li>· Liberal Arts and Sciences, Humanities</li> <li>· Philosophy and Religious Studies</li> <li>· Homeland Security, Law Enforcement, Protective Services</li> <li>· Public Administration and Social Services</li> <li>· Social Sciences and History</li> <li>· Business, Mgmt, Marketing, Related Support Svcs</li> </ul>
High	Value	\$18,209	\$24,853
	Examples	<ul style="list-style-type: none"> <li>· Engineering</li> <li>· Engineering Technologies</li> <li>· Health Professions, Related Programs</li> </ul>	<ul style="list-style-type: none"> <li>· PhD: Computer and Information Science</li> <li>· PhD: Engineering</li> <li>· PhD: Systems Science and Theory</li> </ul>

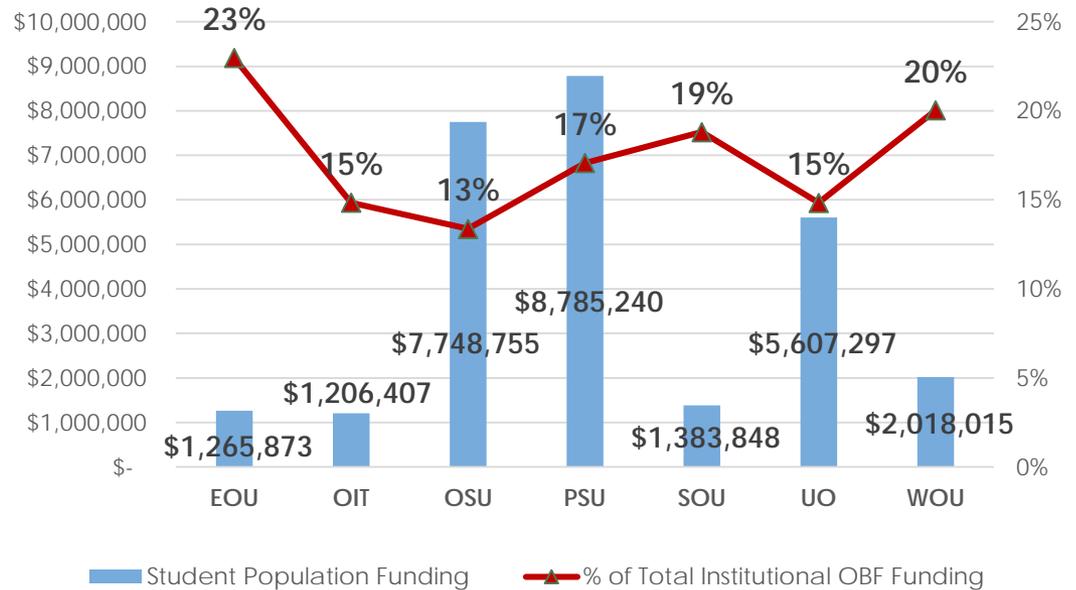
# TARGETED POPULATION FUNDING

## Targeted Populations

Additional weighting applied to Bachelor degree completions by students who identify as members of one or more of the following student populations:

- Low-income
- Underrepresented minority
  - American Indian/Alaskan Native
  - Hispanic
  - Pacific Islander
  - Black
  - African American
- Rural
- Veteran

### FY18 Student Population Funding by Institution



### FY18 TARGETED POPULATION ALLOCATION

Number of Targeted Characteristics	Category Weight	# of Degrees*	Add'l Allocation per Degree	\$ Allocated by Category
1	0.8	5947.3	\$3,280.88	\$19,512,487
2	1.0	1853.3	\$4,101.10	\$7,600,705
3	1.1	200.0	\$4,511.21	\$902,242
<b>Total</b>				<b>\$28,015,434</b>

\*3 yr avg

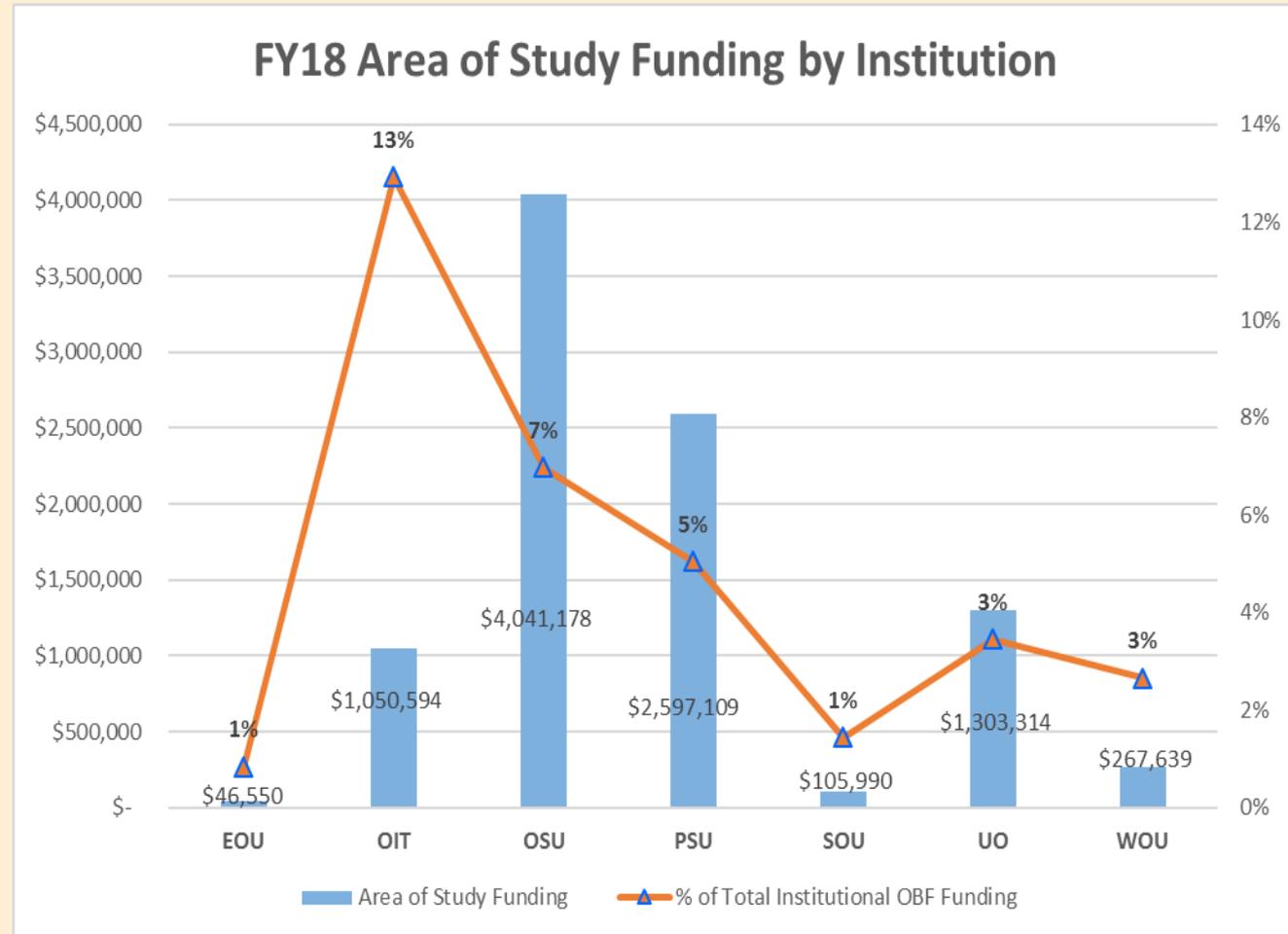
# AREA OF STUDY BONUS

## Area of Study

Additional weighting applied to degree completions which are completed in Areas of Study which serve a critical need for the State economy.

- STEM programs
- Health programs
- Bilingual Teacher Education
- Applies to all degree levels
- Determined by CIP code

Area of Study (All Degrees)	Weight
STEM	120%
Health	120%
Bilingual Education	220%

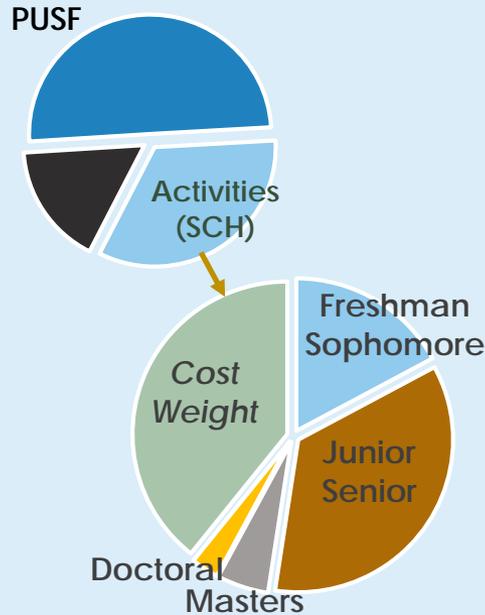


# ACTIVITY BASED FUNDING (SCH)

## SCH Funding

Points-based system that compares resident Student Credit Hours (SCH) completions among the institutions

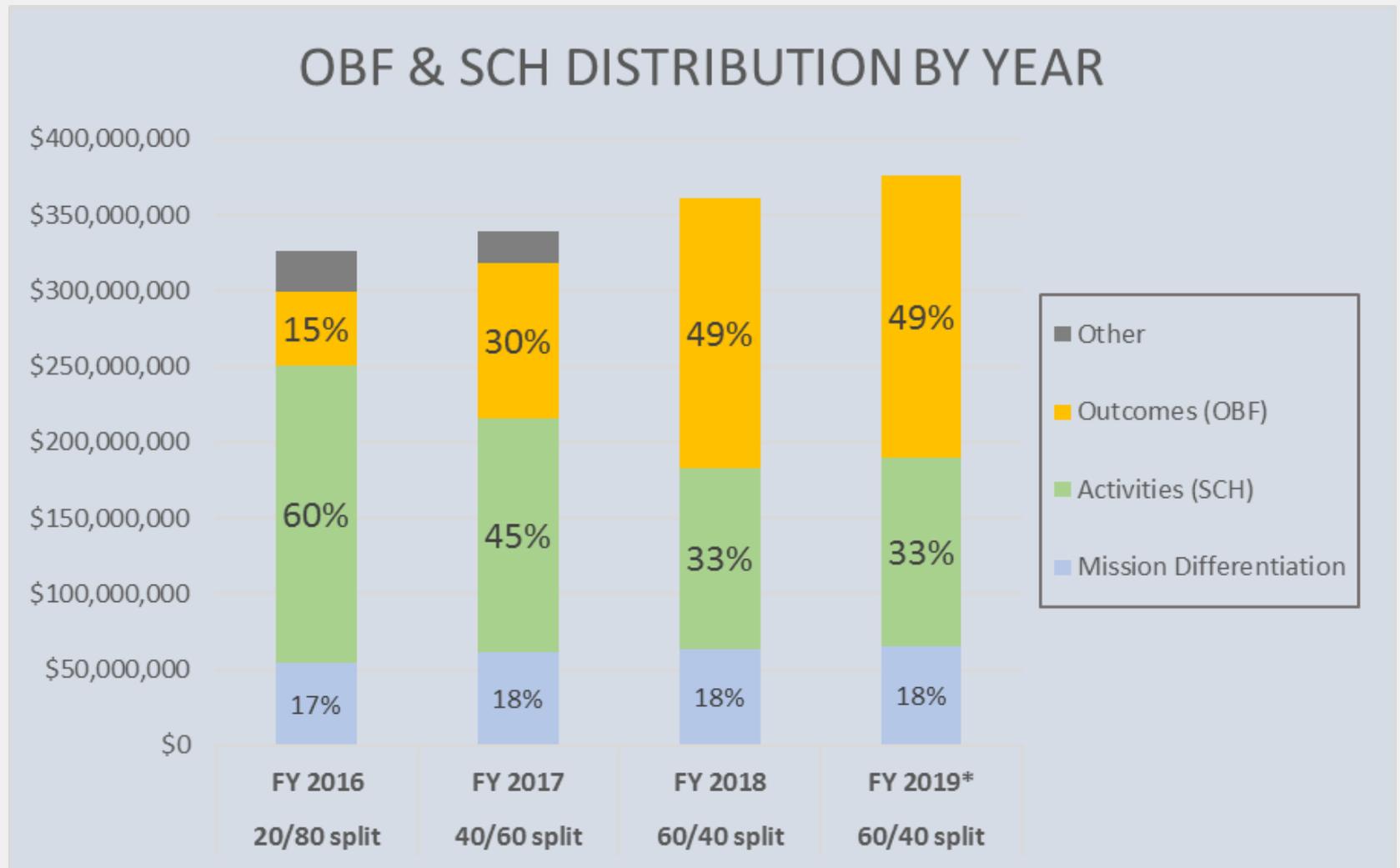
- Student Credit Hours are funded based on number transcribed in each recognized CIP Code
  - Averaged over prior 3-year period
- Credit Hours are cost-weighted based on student level, field of study, and degree level.



## SCH PER STUDENT CREDIT HOUR FUNDING RANGE

	Value	\$29/SCH
Low	Example	<b>Freshman Level</b> ·Natural Resources, Conservation ·Area, Ethnic, Cultural, Gender, Group Studies ·Foreign Languages, Literatures, Linguistics ·English Literature and Language ·History ·Liberal Arts and Sciences, Humanities ·Mathematics and Statistics ·Philosophy and Religious Studies ·Psychology ·Social Sciences and History
	Value	\$122/SCH
High	Examples	<b>PHD Level</b> ·Computer and Information Science ·Engineering ·System Science and Theory ·Science Technologies ·Business, Mgmt, Marketing, Related Support Svcs
	Value	\$122/SCH

# SHIFT FROM ACTIVITY BASED (SCH) FUNDING TO OUTCOMES BASED FUNDING (OBF)



\*2018-19 based on projected data

# STOP LOSS/STOP GAIN

## Stop Loss/Stop Gain

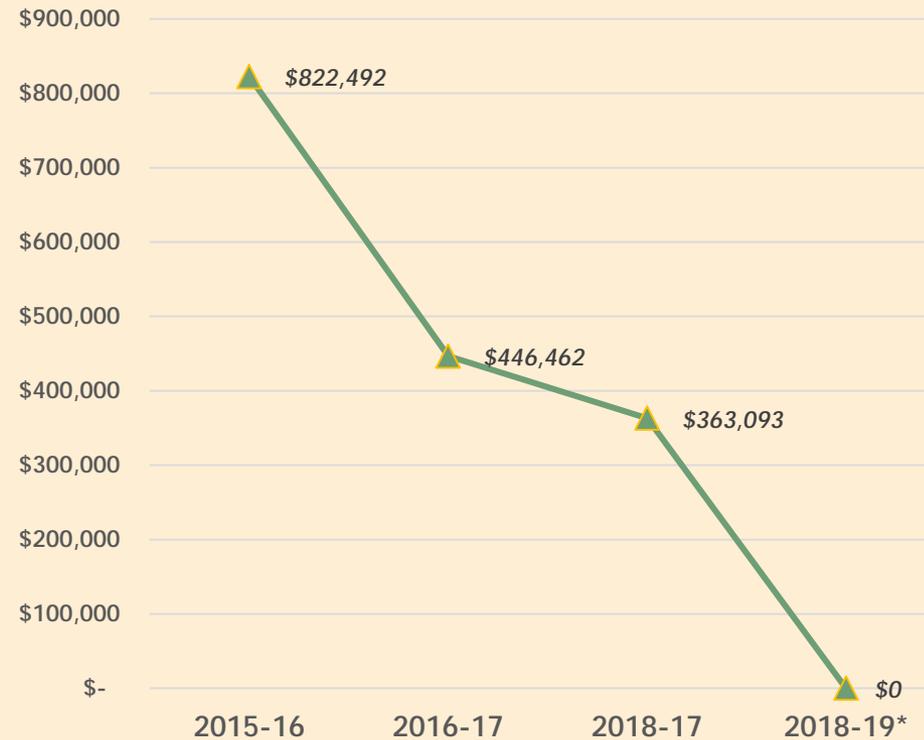
Built-in SSCM mechanism which prevents an individual institution from absorbing an excessive loss or increase of funds

- Only applicable during the SSCM phase-in period
- Thresholds established beginning with FY16
- Incrementally decreased each year through FY19
- Stop Loss/Gain disengaged beginning FY20

### Stop Loss/Gain Thresholds & Triggering Institutions

	2015-16	2016-17	2017-18	2018-19
Stop Loss Threshold	4.5%	2.0%	1.0%	0.0%
	<i>n/a</i>	<b>EOU</b> <b>SOU</b>	<b>SOU</b>	<i>n/a</i>
Stop Gain Threshold	27.3%	37.3%	47.3%	57.3%
	<b>PSU</b>	<i>n/a</i>	<i>n/a</i>	<i>n/a</i>

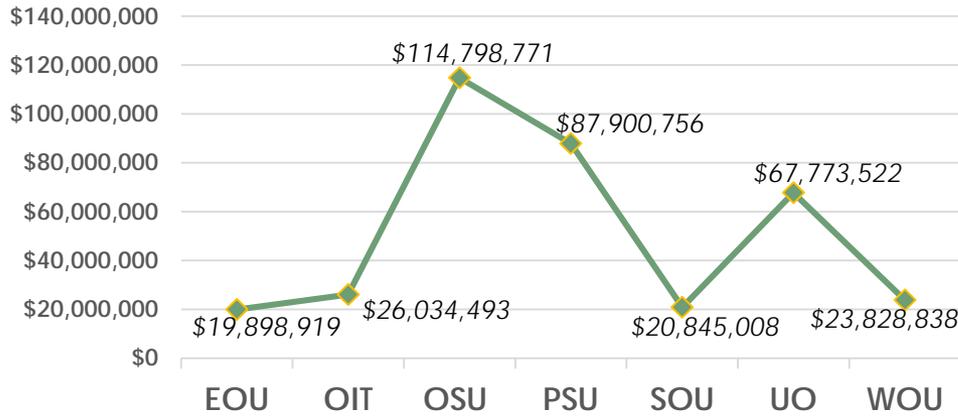
## TOTAL MAGNITUDE OF REDISTRIBUTED PUSF FUNDS DUE TO STOP LOSS



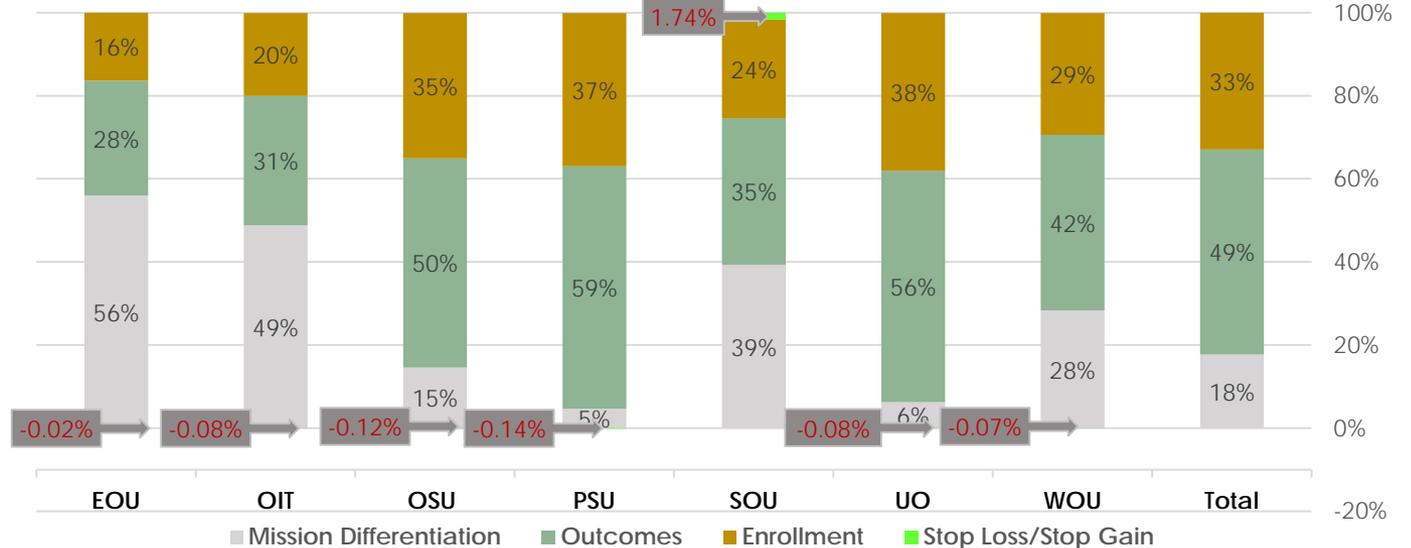
\*2018-19 based on projected data

# 2017-19 SSCM TOTAL FUNDING BY INSTITUTION

## FY18 TOTAL FUNDING BY INSTITUTION



## % of 2018 Funding by SSCM Element



# 2017-19 LAB

2017-19 Legislatively Adopted Budget				
Description	SB 5524	SB 256	HB 5006	Total
<b>Operations (GF)</b>				
Public University Support Fund	\$ 736,898,583	\$ -	\$ -	\$ 736,898,583
Public University State Programs	\$ 39,726,110	\$ 190,000	\$ 1,730,000	\$ 41,646,110
<b>Education &amp; General Subtotal</b>	<b>\$ 776,624,693</b>	<b>\$ 190,000</b>	<b>\$ 1,730,000</b>	<b>\$ 778,544,693</b>
Agricultural Experiment Station	\$ 66,088,861	\$ -	\$ -	\$ 66,088,861
Extension Service	\$ 47,717,403	\$ -	\$ -	\$ 47,717,403
Forest Research Laboratory	\$ 10,224,041	\$ -	\$ -	\$ 10,224,041
<b>Statewide Public Services Subtotal</b>	<b>\$ 124,030,305</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 124,030,305</b>
<b>Subtotal Operations</b>	<b>\$ 900,654,998</b>	<b>\$ 190,000</b>	<b>\$ 1,730,000</b>	<b>\$ 902,574,998</b>
Debt Service	\$ 161,731,988	\$ -	\$ (8,501,533)	\$ 153,230,455
Capital Construction (GF)	\$ -	\$ -	\$ 1,690,000	\$ 1,690,000
<b>Total GF Operations</b>	<b>\$ 1,062,386,986</b>	<b>\$ 190,000</b>	<b>\$ (5,081,533)</b>	<b>\$ 1,057,495,453</b>
<b>Lottery Fund</b>				
Sports Lottery	\$ 8,240,000	\$ -	\$ -	\$ 8,240,000
Outdoor School (Extension Service)	\$ 24,000,000	\$ -	\$ -	\$ 24,000,000
Debt Service	\$ 31,921,630	\$ -	\$ (40,020)	\$ 31,881,610
<b>Total Lottery Fund</b>	<b>\$ 64,161,630</b>	<b>\$ -</b>	<b>\$ (40,020)</b>	<b>\$ 64,121,610</b>
<b>Total General and Lottery Funds</b>	<b>\$ 1,126,548,616</b>	<b>\$ 190,000</b>	<b>\$ (5,121,553)</b>	<b>\$ 1,121,617,063</b>
<i>Debt Service - Combined GF &amp; LF</i>	\$ 193,653,618	\$ -	\$ (8,541,553)	\$ 185,112,065