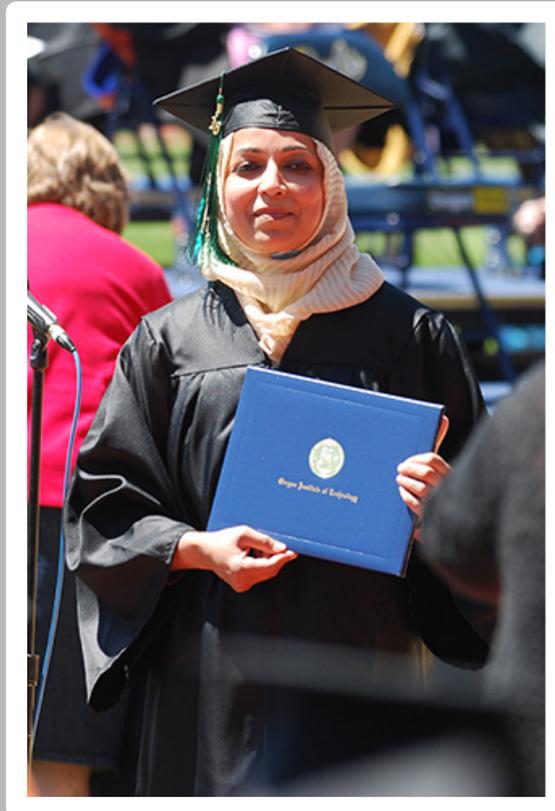


2017 UNIVERSITY EVALUATION: Oregon Institute of Technology



Source: Oregon Institute of Technology

2017 UNIVERSITY EVALUATION: OREGON INSTITUTE OF TECHNOLOGY

TABLE OF CONTENTS

INTRODUCTION	
Legislative Mandate	3
Evaluation Process	4
Statewide Context	5

ACCREDITATION	8
----------------------	---

STUDENT SUCCESS AND ACCESS	13
-----------------------------------	----

AFFORDABILITY	17
----------------------	----

ACADEMIC QUALITY AND RESEARCH	18
--------------------------------------	----

COLLABORATION	21
----------------------	----

SHARED ADMINISTRATIVE SERVICES	25
---------------------------------------	----

FINANCIAL METRICS	27
--------------------------	----

BOARD OF TRUSTEES	29
--------------------------	----

CONCLUSION	32
-------------------	----

INTRODUCTION

This report is guided by Oregon Revised Statute 352.061, which requires that the Higher Education Coordinating Commission (HECC) submit to the Legislative Assembly an evaluation of public universities listed in ORS 352.002. Each public university must be evaluated in the manner required by this section once every two years. The purpose of this report is to evaluate the contributions of Oregon Institute of Technology (Oregon Tech) to State objectives for higher education as articulated in statute and in the HECC's Strategic Plan (https://www.oregon.gov/HigherEd/Documents/HECC/Reports-and-Presentations/HECC-StrategicPlan_2016.pdf). The Report relies on a combination of accreditation reports, self-assessments conducted by the university on criteria jointly developed with the HECC, and state and federal data. This is the second annual report and as such it is a benchmark document that is formative in scope. It signals areas of key interest to the HECC that support the objectives of the State of Oregon: student success as measured by degree completion; access and affordability as measured by equity across socioeconomic, racial/ethnic and regional (urban/rural) groups; academic quality and research; financial sustainability; and continued collaboration across universities in support of the State's mission for higher education. Additionally, the report describes how OIT's Board of Trustees has operated since its formation in July 2015. The form and content of subsequent annual evaluations will be guided by feedback from legislators, the public, and the universities about how to improve the usefulness of this process and product.

LEGISLATIVE MANDATE (SB 270)

Passed by the Oregon legislature in 2013, Senate Bill 270 (SB 270) (2013) established individual governing boards at the University of Oregon and Portland State University. It also established a process for the other five Oregon public universities to establish individual governing boards, which they subsequently did. In addition, the bill required the Higher Education Coordinating Commission (HECC) to conduct annual evaluations of the universities. The stipulations required by the bill are codified in Oregon Revised Statute (ORS 352.061).

ORS 352.061(2) stipulates that the HECC's evaluations of universities must include:

- a) A report on the university's achievement of outcomes, measures of progress, goals and targets; and
- b) An assessment of the university's progress toward achieving the mission of all education beyond high school as described in ORS 350.014 (the 40-40-20 goal).

Finally, ORS 352.061(2)(c) also requires that the HECC assess university governing boards against the findings set forth in [ORS 352.025](#), including that governing boards:

- a) Provide transparency, public accountability and support for the university.
- b) Are close to and closely focused on the individual university.
- c) Do not negatively impact public universities that do not have governing boards.
- d) Lead to greater access and affordability for Oregon residents and do not disadvantage Oregon students relative to out-of-state students.
- e) Act in the best interests of both the university and the State of Oregon as a whole.

- f) Promote the academic success of students in support of the mission of all education beyond high school as described in ORS 350.014 (the 40-40-20 goal).

For context, ORS 352.025 notes four additional Legislative findings:

- a) Even with universities with governing boards, there are economy-of-scale benefits to having a coordinated university system.
- b) Even with universities with governing boards, shared services may continue to be shared among universities.
- c) Legal title to all real property, whether acquired before or after the creation of a governing board, through state funding, revenue bonds or philanthropy, shall be taken and held in the name of the State of Oregon, acting by and through the governing board.
- d) The Legislative Assembly has a responsibility to monitor the success of governing boards at fulfilling their missions, their compacts and the principles stated in this section.

EVALUATION PROCESS

In an effort to approach the first annual evaluation in a collaborative manner, in 2015 the HECC formed a work group comprised of university provosts, inter-institutional faculty senate, staff from the Chief Education Office, HECC staff, then-HECC Commissioner Kirby Dyess, and other university faculty and staff. The workgroup began meeting in February 2015 with a focus on understanding the purpose and scope of the evaluation as defined in statutes, the structure of the evaluation, and the process for the evaluation. As a result of these conversations, an evaluation framework was developed as a tool to assist in the evaluation process.

During its development, the framework was shared with various groups such as university presidents, university faculty senates, and others, to seek feedback and input on the framework. The framework was revised based on input and suggestions and three categories were identified as organizers. These included institutional focus areas, governance structure focus areas, and academic quality. Each category contained key metrics and performance measures of academic quality that were aligned with the newly-adopted student success and completion model indicators. After final review and consideration of stakeholder feedback, the HECC adopted the framework on September 10, 2015. The framework template is populated with data from the HECC Research Office and then verified by university offices for institutional research and data. All data included in this report is from the HECC unless otherwise indicated.

A balanced evaluation of whether Oregon's public universities are meeting the goals described for them by State law does not lend itself to a formulaic or mechanical approach. The Commission draws from contextual elements such as the State's fluctuating funding for higher education and changing student demographics to help explain data in the framework, and progress towards goals. The Commission also leverages other evaluations already undertaken by universities including self-studies, accreditation reports and the work of boards of trustees to provide a perspective that is uniquely focused on each institution's contribution to serving the State's higher education mission under the new governance model.

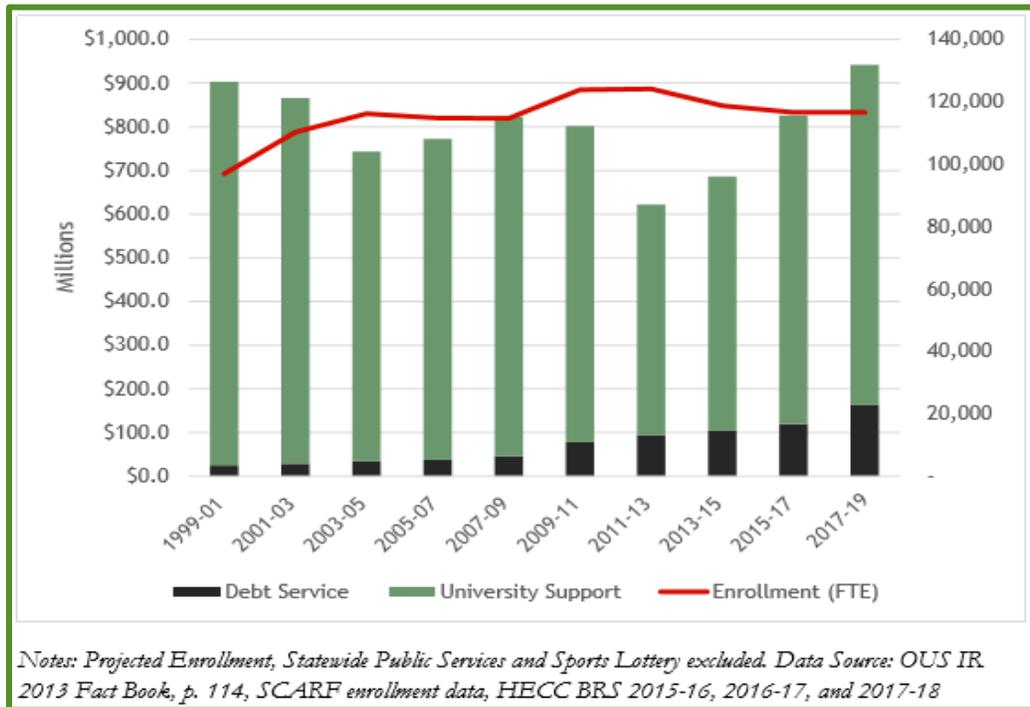
This report is focused on the legislative charge and the HECC's primary areas of emphasis as indicated in its Strategic Plan. This report is not a comprehensive evaluation. It reflects the narrower scope of legislative issues of interest, incorporating findings from accreditation studies where there is overlap.

STATEWIDE CONTEXT

Funding History

Over the past several biennia, state funding for public universities has not kept pace with enrollment or inflation. While recent investments have moved the needle in the right direction, additional funding is necessary to support institutions as they work to increase the graduation and completion rates for a growing diverse population.

Figure 1: Public University Funding



Governance Changes

Senate Bill 270 outlines the benefits that are to be achieved from having public universities with governing boards that are transparent, closely aligned with the university’s mission, and that “act in the best interest of both the university and state of Oregon as a whole.” In addition, the Legislature found that there are benefits to having economies of scale and as such, universities were granted the ability to continue participation in shared service models. It is important to note that all public universities are required to participate in group health insurance, a select set of group retirement plans, and collective bargaining through July 1, 2019 per ORS 352.129.

Local Conditions and Mission

Oregon Tech locations throughout the Northwest include the main campus in Klamath Falls, an urban campus in Wilsonville, and the Oregon Tech Seattle¹ site, which offer specific degree options, and the Dental Hygiene degree completion partnership with Chemeketa Community College on its Salem campus. Oregon Tech's academic programs emphasize professional, accredited bachelor's and master's degree programs in engineering, computing, technology, business and management, and health professions. Recognized as the only public polytechnic university in the Northwest, over time Oregon Tech has broadened its activities to include the delivery of graduate programs in Engineering, Civil Engineering, Manufacturing Engineering Technology, Renewable Energy Engineering, Marriage and Family Therapy, and Allied Health, and Applied Behavior Analysis.

The practical application of theory in real world situations underscores all Oregon Tech academic programs. Students experience hands-on learning through labs, projects, internships, externships, and research, guided by faculty and staff who retain their professional connections to applicable industries and disciplines. Oregon Tech programs lead to careers in health professions, renewable energy, environmental science, information technology, engineering, engineering technology, communication, psychology, and management. Due to the degree emphases and educational methodologies, 88 percent of graduates report employment in their degree field or enrollment in graduate programs within six months of graduation (Year Seven Self Study 2016). Oregon Tech is known for employing technology directly on campus. Its Klamath Falls campus is one of the only university campus in the world that generates nearly all of its electric and heat resources entirely through a combination of geothermal and solar sources. (http://www.oit.edu/docs/default-source/board-of-trustees-documents/2016-meetings/february/3-4-oit-report_2-2-econorthwest.pdf?sfvrsn=2)

ORS 350.075 and 350.085 require the HECC to review and approve public university mission statements. At its April 14 and June 9, 2016 meetings the HECC reviewed and approved the University's mission statement. The mission and core themes of Oregon Tech are reproduced here:

MISSION:

Oregon Institute of Technology, an Oregon public university, offers innovative and rigorous applied degree programs in the areas of engineering, engineering technologies, health technologies, management, and the arts and sciences. To foster student and graduate success, the university provides an intimate, hands-on learning environment, focusing on application of theory to practice. Oregon Tech offers statewide educational opportunities for the emerging needs of Oregonians and provides information and technical expertise to state, national, and international constituents.

CORE THEMES:

- Applied degree programs
- Student and graduate success
- Statewide educational opportunities
- Public Service

¹ The La Grande dental hygiene site is closed due to MODA Health's ceasing support of the campus. The last class graduated in March 2017.

ECONOMIC AND COMMUNITY IMPACT

Oregon Tech commissioned ECONorthwest to estimate the economic contributions of its capital expenditures and operations in Oregon for the year ending June 30, 2015 (“FY15”). The Report on which this section is based can be found at: http://www.oit.edu/docs/default-source/board-of-trustees-documents/2016-meetings/february/3-4-oit-report_2-2-econorthwest.pdf?sfvrsn=2.

In this analysis, all of the economic outputs reported are “gross” impacts instead of “net” impacts. The estimates ECONorthwest provided in their report represent an upper bound for economic activity that is attributable to Oregon Tech in FY15. ECONorthwest notes that while the results are meaningful, they do not necessarily reflect the creation of *new* jobs or income in the regional economy.

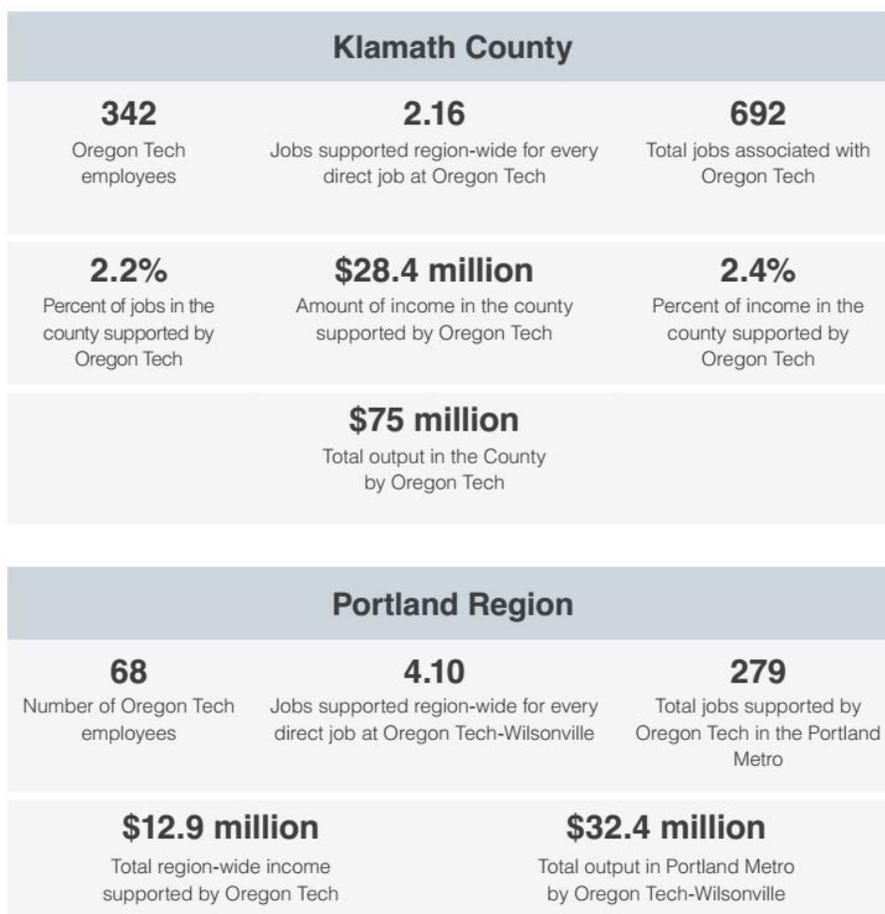
LOCAL AND REGIONAL IMPACTS

Oregon Tech is the only polytechnic university in the Pacific Northwest, providing Oregon and the region with roughly 700 prepared, career-ready graduates each year.

Oregon Tech provides Oregon with a wealth of high-skill, in-demand graduates at a reasonable cost and thus high return on investment to students. Based on the U.S. Department of Education’s College Scorecard, Oregon Tech’s average annual enrollment costs to graduate salary ratio is the lowest in the state among reported institutions (28 cents per dollar earned), with graduates earning 46 percent above the national average salary 10 years after starting the program.

The most common approach for measuring economic impacts captures the short-run economic contributions associated with a university’s current operations and capital spending, as well as spending by students and visitors to its campuses. This captures the benefits (in terms of dollars and jobs) to the local and regional businesses as students and visitors travel to campus and spend money at hotels, restaurants, apartments, grocery stores, etc. This information included here describes the economic impacts associated with Oregon

FIGURE I. BY THE NUMBERS – LOCAL AND REGIONAL IMPACTS



Note: Portland Region denotes Multnomah, Washington, and Clackamas Counties.

Tech’s student, payroll, and capital expenditures during FY15. ECONorthwest measured the various economic impacts of Oregon Tech across three geographies: Klamath County, Clackamas County, and the Portland Metro area. The three types of economic impacts are as follows:

1. **Direct Impacts** are those associated with the payroll and employment. They also include the direct output of the activities associated with the university, which is estimated using an expenditure approach that sums labor and non-labor operating expenses.
2. **Indirect Impacts** are the goods and services purchased for operations and by students and visitors. This spending generates the first round of indirect impacts. Suppliers will also purchase additional goods and services; this spending leads to additional rounds of indirect impacts. Because they represent interactions among businesses, these indirect effects are often referred to as supply-chain impacts.
3. **Induced Impacts** are the purchases of goods and services from household incomes. The direct and indirect increases in employment and income enhance the overall purchasing power in the economy, thereby inducing further consumption. Employees at the university, for example, will use their income to purchase groceries or take their children to the doctor. These induced effects

TABLE 7. IMPACTS BY MAJOR INDUSTRY SECTOR

Industry	Klamath Falls	Clackamas County	Portland Metro
Agriculture	\$32,457	\$8,991	\$23,501
Construction	\$1,298,470	\$330,030	\$553,067
Government	\$36,094,403	\$7,140,581	\$7,584,281
Manufacturing	\$131,396	\$50,532	\$422,653
Mining	\$8,233	\$3,656	\$18,839
Service	\$26,512,632	\$13,578,220	\$18,616,191
Trade	\$3,045,573	\$1,159,428	\$1,718,744
Other	\$3,131,950	\$1,097,455	\$2,388,485
Total	\$67,123,164	\$22,271,438	\$28,937,276

are often referred to as consumption-driven impacts.

ACCREDITATION

This report is formative and focuses on the areas of interest identified by the Legislature and in alignment with the HECC’s Strategic Plan. It is not intended to be a comprehensive evaluation of Oregon Tech. A more comprehensive assessment and review of academic and institutional quality is available from the Northwest Commission on Colleges and Universities (NWCCU), which accredits Oregon Tech and other universities in Oregon. Accreditation of an institution of higher education by the NWCCU indicates that it meets or exceeds criteria for the assessment of institutional quality evaluated through a peer review process. An accredited college or university is one that has been found to have the necessary resources available to achieve its stated purposes through appropriate educational programs, and to be substantially doing so, and which provides reasonable evidence that it will continue to do so in the foreseeable future. Institutional integrity also is addressed through accreditation. This section draws on the relevant parts of NWCCU reports, supplemented

with information on economic and community impact (identified from Oregon Tech sources). Other components of NWCCU reports are incorporated elsewhere, as appropriate.

Oregon Institute of Technology (Oregon Tech) was established in 1947 to retrain members of the military returning from World War II. In its early years, the Oregon Technical Institute (OTI) delivered primarily vocational education and training. After being renamed the Oregon Institute of Technology in 1973, the college developed associate degree programs in technology areas to replace vocational skills training.

Since becoming a baccalaureate institution in 1966, Oregon Tech has emphasized professional, accredited programs in engineering, computing, technology, management, and allied health. Recognized as the only public institute of technology in the Northwest, Oregon Tech has broadened its activities to include the delivery of graduate programs. Current graduate degree program offerings include Engineering, Civil Engineering, Manufacturing Engineering Technology, Renewable Energy Engineering, Allied Health and Marriage and Family Therapy. A graduate certificate in Applied Behavior Analysis is also offered (Year Seven Self Study 2016).

Oregon Tech is the home of the Oregon Center for Health Professions and the Oregon Renewable Energy Center Oregon Manufacturing Innovation Center. Through these centers, the university supports major activities in allied health and the health sciences, development of renewable energy and advances cutting edge manufacturing and metals research.

Oregon Tech also delivers a variety of undergraduate degrees and courses through Oregon Tech Online (formerly Distance Education), including specialized degree completion programs offered to working professionals throughout the nation. Oregon Tech Online has experienced significant growth in web-based curricula.

In Spring 2016, Oregon Tech was affirmed for accreditation with the NWCCU following its Year Seven Evaluation (*Mission Fulfillment and Sustainability*). The following information is drawn from the NWCCU Report NWCCU 7-5-2016 OIT Accreditation Reaffirmed 7 Year Evaluation (002).pdf and the Ad Hoc Report submitted by Oregon Tech to NWCCU in Fall 2017 (Fall 2017 AD Hoc NW Report).

The NWCCU commended the librarians of Oregon Tech for their extraordinary support of faculty, students, and individual courses as well as for their contributions to curriculum development, academic departments, and numerous departmental and institutional committees. The Commission also found Oregon Tech's commitment to ensuring physical facilities that are safe, secure, sufficient, attractive and sustainable noteworthy. Oregon Tech was also applauded for its outreach to communities in support of a broader community impact in spite of continuing financial challenges. The Commission lauded the Financial Aid staff for their initiative to improve financial literacy to student loan recipients, and commended the faculty, staff and students for the high degree of positive involvement in the academic processes of the institution such as general education, assessment, teaching support, planning, student support and advising, and governance.

In affirming accreditation, the NWCCU requested that Oregon Tech address the first two recommendations that came out of the evaluation in an Ad Hoc report due in Spring 2017. These two recommendations, indicated below, are areas that did not meet the NWCCU's criteria for accreditation.

- 1) Oregon Tech is to complete, approve and execute an agreement between the institution and the Foundation that clearly defines the relationship between the two institutions.
- 2) Oregon Tech is to develop, enforce and document enforcement of a policy for credit for prior learning assessment that clearly meets the criteria of Standard 2.C.7 of the NWCCU Accreditation Manual.

The Spring Ad Hoc report was submitted on schedule. The NWCCU indicated that recommendation one (1) was in compliance but recommendation two (2) was still out of compliance and requested another Ad Hoc Report in Fall 2017 to document evidence of compliance. The Fall Ad Hoc Report was submitted at the end of September 2017. A decision is pending.

The remaining three recommendations, see below, are indicative of areas in which Oregon Tech was considered to be substantially in compliance but could improve. The NWCCU requested that Oregon Tech address these areas in a spring 2019 AD Hoc Report.

- 1) Oregon Tech is to utilize planning and assessment effectively to guide Core Theme enactment, decision making, resource allocation and capacity and engage and enable input by constituents.
- 2) Oregon Tech regularly review its assessment processes to ensure that they appraise authentic achievements and yield meaningful results that lead to improvement.
- 3) Oregon Tech engage in a regular, systematic, participatory, self-reflective and evidence-based assessment of its accomplishments.

Oregon Tech submitted its Year One Report in March 2017 and is on track with its accreditation schedule.

Table 1: Individual programs in Oregon Tech are accredited by professional organizations

Program or School	Degree Level(s)	Recognized Agency	Date
Civil Engineering	BS	ABET ²	2017
Computer Engineering Technology	AE, BS	ABET	2015
Electrical Engineering	BS	ABET	2017
Electronics Engineering Technology	BS	ABET	2015
Embedded Systems Engineering Technology	BS	ABET	2015
Geomatics	BS	ABET	2013
Manufacturing Engineering Technology	BS	ABET	2015
Mechanical Engineering	BS	ABET	2017

² ABET Accreditation Board for Engineering and Technology

Mechanical Engineering Technology	BS	ABET	2015
Renewable Energy Engineering	BS	ABET	2017
Software Engineering Technology	AE	ABET	2015
Software Engineering Technology	BS	ABET	2015
Department of Management	BS	International Assembly for Collegiate Business Education (IACBE)	2015
Clinical Laboratory Sciences	BS	National Accrediting Agency for Clinical Laboratory Sciences (NAACLS)	2015
Dental Hygiene	AAS, BS	American Dental Association Commission on Dental Accreditation (CODA)	2017
Diagnostic Medical Sonography	BS	Commission on Accreditation of Allied Health Education Programs (CAAHEP)	2015
Echocardiography	BS	Commission on Accreditation of Allied Health Education Programs (CAAHEP)	2015
Paramedic Education Program	AAS	Commission on Accreditation for Emergency Medical Services Professions (CoAEMSP)	2012
Polysomnography	Certificate, AAS	Commission on Accreditation for Polysomnography (CoA PSG)	2011
Respiratory Care	BS	Commission on Accreditation for Respiratory Care (Co ARC)	2011

Vascular Technology	BS	Commission on Accreditation of Allied Health Education Programs (CAAHEP)	2015
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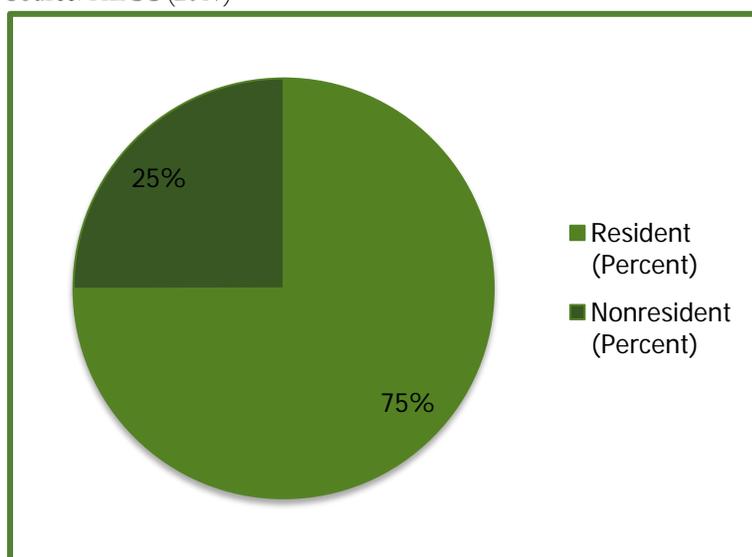
STUDENT ACCESS AND SUCCESS

Nationally, enrollment in higher education has generally declined since its peak during the Great Recession. Oregon sees a similar pattern with some variation across institutions, particularly in the enrollment and completion rates for low income, minority, and rural students. Oregon Tech has somewhat gone against this downward enrollment trend, showing positive growth in enrollment in the last several years from its various campuses and sites, specifically at its Wilsonville campus, Online campus, and in its college-credit offerings to high schools. This section of the report is focused on trends in enrollment and completion outcomes.

For the 2016-17 academic year the majority (75%) of Oregon Tech students were residents. Slightly more than half of Oregon Tech students attend part-time.

Figure 2: Oregon Tech Student Enrollment by Residency, Fall 2016

Source: HECC (2017)

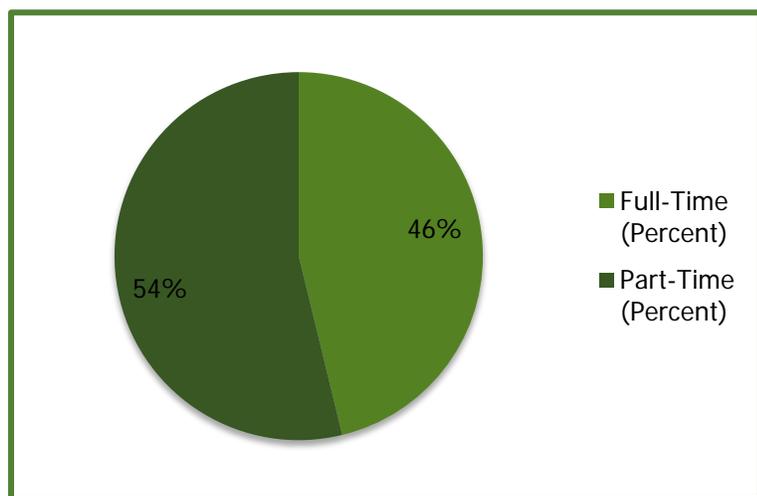


Continuing a decade of enrollment increases, fall 2017 saw continued strong enrollment growth from the previous fall: for non-residents (-1.1%), residents (6.9%), and overall (4.9%).

While single year enrollment changes do not constitute a trend on their own, they are generally consistent with longer term enrollment patterns at Oregon Tech. Over the last decade, Oregon Tech's total enrollment has grown by more than 55.7% (from 3,525 in 2008 to 5,490 in 2017). Growth has been significant for both non-resident and resident students, increasing 76% and 50% respectively.

Figure 3: Oregon Tech Student Enrollment by Full-Time/Part-Time Status, Fall 2016

Source: HECC (2017)



Of the Oregon Tech students enrolled in Fall 2017, 914 were newly admitted undergraduates, compared to 987 newly admitted undergraduates in the previous academic year. The fall 2017, non-resident newly admitted class decreased by 16.0% from the previous year, while the number of newly-admitted resident students decreased by 3.2%. Of the 5,232 students enrolled in Oregon Tech in fall 2016, 16.7% (872) were from underrepresented minority populations. Among the resident student population, underrepresented minority students constituted 16.6%. For fall 2017, the proportion of

underrepresented minority students increased to 17.7% (overall) and 12.6% (URM residents in total student

population). There was an increase in enrollment in every category by race/ethnicity for underrepresented minority students, and especially so for Black Non-Hispanic and Hispanic students.

Table 2: Oregon Tech Headcount Enrollment by Race/Ethnicity, Fall 2014, 2015, 2016, and 2017

Source: HECC (2017)

Race/ Ethnicity	Fall 2014	Fall 2015	Fall 2016	Fall 2017	Change Fall 2016 to Fall 2017
Non-Resident Alien	43	78	92	127	35
American Indian/ Alaska Native	49	52	60	54	(6)
Asian	234	282	353	399	46
Black Non-Hispanic	58	74	104	103	(1)
Hispanic	357	397	503	597	94
Pacific Islander	27	27	29	35	(6)
Two or more races, Underrepresented Minorities	144	174	176	180	4
Two or more races, not Underrepresented Minorities	70	88	96	107	11
White Non-Hispanic	3,139	3,313	3,506	3644	138
Unknown	152	78	313	244	(69)

Different student populations do not graduate at similar rates. Underrepresented minority students graduate at rates that are substantially less than the rate for the overall student population. The four and six-year graduation rates for OIT's First Time Freshmen who entered in fall 2010 are as follows:

Table 3: Four-Year and Six-Year Graduation Rate, First-Time, Full-Time Freshmen Entering OIT in Fall 2010

	Four-Year Graduation Rate	Six-Year Graduation Rate
All Students	23.1 %	53.5 %
Underrepresented Minorities	13.6 %	38.6 %
Pell Grant Recipients	22.5 %	54.2 %

Source: HECC (2017)

*Fall 2010 cohort is the latest year of available data.

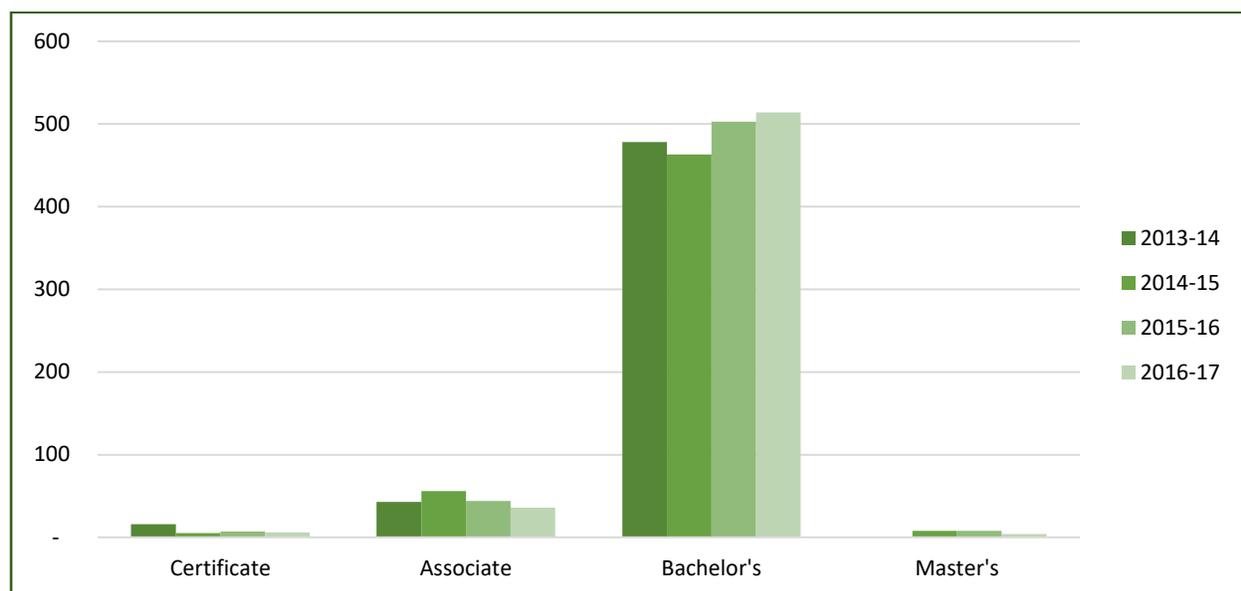
The number of bachelor's degrees awarded to resident students has been steadily increasing since 2013. Oregon Tech awarded 8 fewer associate's degrees and 4 fewer master's degrees. Oregon Tech does not offer doctoral or professional degrees.

Table 4: OIT Resident Student Completions by Award Type

	2013-14	2014-15	2015-16	2016-17
Certificate	16	5	7	6
Associate's	43	56	44	36
Bachelor's	478	463	503	514
Master's	1	8	8	4
Doctoral	-	-	-	-
Professional	-	-	-	-

Source: HECC (2017)

Figure 4: Oregon Tech Resident Student Completions by Award Type



Source: HECC (2017)

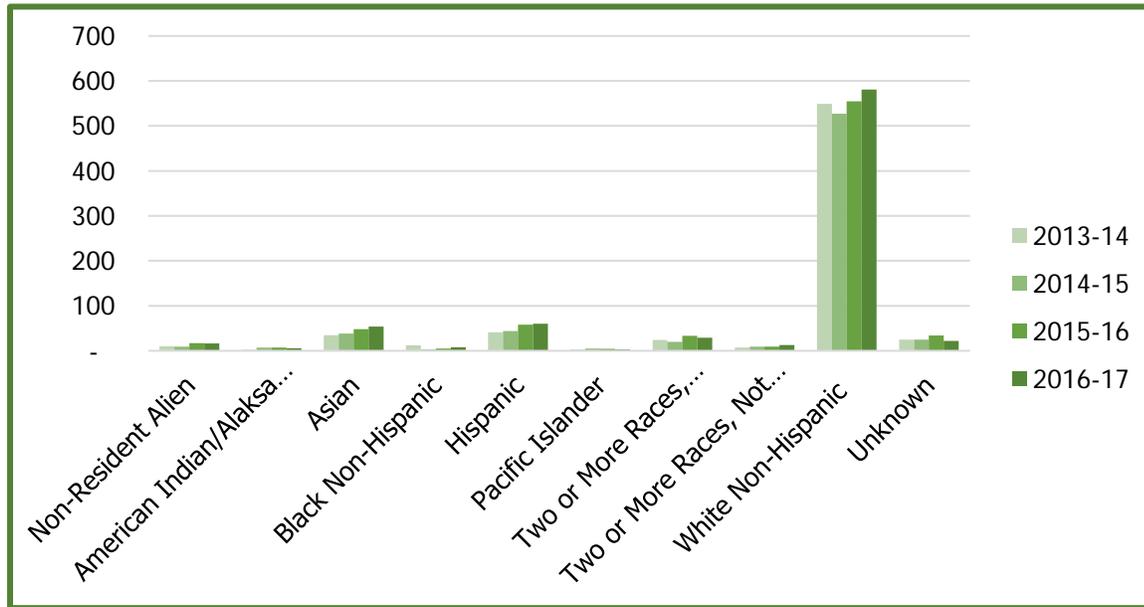
Oregon Tech saw an increase of 3.2% in the number of students graduating in 2017 compared to the year before. Asian and White Non-Hispanic students saw the largest increases. Of underrepresented minorities, Hispanic and Black Non-Hispanic students had slight increases. Other under-represented groups essentially remained flat or declined.

Table 5: Oregon Tech Completions by Race/Ethnicity

Race/Ethnicity	2013-14	2014-15	2015-16	2016-17
Non-resident alien	10	9	17	16
American Indian/ Alaska Native	2	7	7	6
Asian	35	38	48	54
Black Non-Hispanic	12	3	5	8
Hispanic	41	44	58	60
Pacific Islander	3	5	4	3
Two or more races, Underrepresented Minorities	24	20	33	29
Two or more races, not Underrepresented Minorities	7	9	9	13
White Non-Hispanic	549	527	555	581
Unknown	25	25	34	22

Source: HECC (2017)

Figure 5: Oregon Tech Completions by Race/Ethnicity



AFFORDABILITY

Among the factors that the HECC is required (under ORS 352.065 and 352.025(1d)) whether universities remain affordable for Oregon residents. The following constitutes our evaluation of the Oregon Institute of Technology’s affordability.

Many students and prospective students at the Oregon Institute of Technology, like their counterparts at other universities around the state and nationwide, continue to face significant challenges related to access and affordability. Public defunding of higher education is a national trend that is shifting a majority of the burden of paying for a college education to students and their families. That shift has been particularly acute in Oregon in recent years. Partly as a result of state funding cuts, resident undergraduate tuition and fees at the Oregon Institute of Technology increased 56.6% in the last 10 years, including increases of 3.0% and 4.8% in 2015-16 and 2016-17 respectively.³ Specifically in 2017-18 tuition increased 5.0% at both OIT campuses and fees increased 3.9% at the Klamath Falls campus and decreased 4.3% at the Wilsonville campus.⁴ The overall increase in resident undergraduate tuition and fees was 4.8% at its Klamath Falls campus and 4.5% at its Wilsonville campus.⁵ Resident graduate students have faced similar increases.

³ Source: <http://www.oit.edu/college-costs/tuition-fees> as well as historical OUS tuition data. Defined to include full-time resident base tuition and all mandatory fees (including incidental fees). Based on OIT’s main Klamath Falls campus.

⁴ A full-time resident undergraduate student (taking 45 credits per year or 15 credits for each of three terms) at Oregon Tech’s main Klamath Falls campus will pay an estimated \$7,920 in tuition and \$1,620 in fees during the 2017-18 academic year. Students at Oregon Tech’s Wilsonville campus will pay the same tuition but only \$399 in fees.

⁵ This increase includes all tuition and mandatory fees (including incidental and other fees that are not subject to HECC review). As a result of the increase in the PUSF from the GRB, OIT’s tuition increase dropped from an original level of 8.0%.

Students, however, do have access to financial aid at the Oregon Institute of Technology. In addition to need-based federal and state financial aid programs (Pell and the Oregon Opportunity Grant), Oregon Institute of Technology students benefit from OIT's significant commitment of institutional resources to scholarships, remissions, and tuition discounts. In the 2016-17 academic year, OIT recorded \$2,792,672 in resident tuition remissions (17.1% of resident gross tuition charges). The year prior, the 2015-16 academic year, OIT recorded \$2,532,399 in resident tuition remissions (16.0% of resident gross tuition charges).

Tuition, however, tells only a small part of the affordability story. The total cost of attendance for students includes significant expenses associated with housing, food, transportation, and textbooks. Oregon Institute of Technology estimates the average student budget for living expenses annually – \$16,227 for the 2017-18 academic year⁶ – exceeds resident tuition and fees.

While it is natural to view affordability primarily in terms of the student's direct cost associated with their enrollment, a larger perspective takes into account whether the student completes his or her degree, does so in a reasonable period of time, and has earning potential commensurate with the debts that might have been incurred. On average, the earnings of federal loan recipients 10 years after beginning school at OIT are \$52,900.⁷ Of Oregon Tech undergraduate degree recipients who leave the university with federal loan debt, their average federally-backed debt load is \$22,875. According to the College Scorecard, during the 2015-16 academic year, 45% of Oregon Tech's students had federally supported loans and 32% received Pell grants.

ACADEMIC QUALITY AND RESEARCH

The introduction of a new state budget model that provides incentives for growth in enrollment and graduation outcomes has triggered concerns across various sectors that the pursuit of economic sustainability may adversely affect academic quality and research. A concern is that institutions might be tempted to lower standards in order to recruit and graduate more students. In light of this concern, there is interest in sustaining rigorous academic quality across all institutions. In partnership with all public universities, the HECC relies on regular external accreditation reviews, and collaborative partnerships with organizations such as the State Higher Education Executive Officers Association (SHEEO) and the Association of American Colleges and Universities (AACU) to pursue promising initiatives to develop nationally-normed outcomes to assess and track student learning and post-graduation success.

Oregon Tech has clearly established processes and oversight committees for curriculum planning (see www.oit.edu for details) and Curriculum Planning Commission (CPC) <https://my.oit.edu/committees/cpc/default.aspx>

Graduate Council <https://my.oit.edu/committees/grad-council/default.aspx>

Commission on Assessment <http://www.oit.edu/faculty-staff/provost/assessment>

General Education Advisory Council (GEAC) Standing Committee <http://www.oit.edu/docs/default-source/faculty-staff-documents/councils-commissions-committees/standing-committees/2017-18-standing-committees.pdf?sfvrsn=10>

Academic Standards Committee (Faculty Senate) <http://www.oit.edu/faculty-staff/resources/faculty-senate/committees>

⁶ Source: <http://www.oit.edu/college-costs/tuition-fees>

⁷ Source for earnings, Pell grant information and debt load is the College Scorecard: <https://collegescorecard.ed.gov/>

Program Reduction and Elimination Policy (PREC) <http://www.oit.edu/docs/default-source/human-resources-documents/faculty-policies-and-procedures/program-reduction-and-elimination---oit-20-050.pdf?sfvrsn=2>

Oregon Tech also has established processes for program reduction and elimination (Program Reduction and Elimination Policy (PREC) <http://www.oit.edu/docs/default-source/human-resources-documents/faculty-policies-and-procedures/program-reduction-and-elimination---oit-20-050.pdf?sfvrsn=2>)

Faculty evaluation and professional development are fundamental to sustaining academic quality. Oregon Tech has clearly defined processes for faculty evaluation (see <http://www.oit.edu/docs/default-source/human-resources-documents/faculty-policies-and-procedures/faculty-evaluation-policy---oit-21-040.pdf?sfvrsn=4>).

Faculty Evaluation Policy <http://www.oit.edu/docs/default-source/human-resources-documents/faculty-policies-and-procedures/faculty-evaluation-policy---oit-21-040.pdf?sfvrsn=4>

Faculty Evaluation Form <http://www.oit.edu/docs/default-source/human-resources-documents/faculty-policies-and-procedures/faculty-evaluation-policy---ape-form-for-teaching-faculty.pdf?sfvrsn=2>

Oregon Tech's mission has a strong focus on excellence in instruction. While professional development is required, faculty members are encouraged to advance their knowledge in education or a specific discipline. Ways in which Oregon Tech faculty currently engage in professional development include professionally relevant employment, seeking grant opportunities, presentations at conferences and workshops, publishing scholarly work in journals, applied research, and participating in professional societies, to name a few. Faculty members often support student teams in competitive projects or engagement with industry partners and professional societies outside the scope of normal classroom activities. Many Oregon Tech faculty also have long established ties to various industries and research laboratories. Scholarship of the faculty tends to naturally fall in areas that enhance course content and promote excellence in teaching.

Two great examples of the above fall into the applied research category.

- 1. Oregon Renewable Energy Center (OREC).** The OREC mission is to enhance development and promote availability of renewable energy through; Energy Systems Engineering, Applied Research, Technical Assistance and Information Dissemination, Academic Degree Programs and Industrial Training and Development. The vision is to grow the Oregon Renewable Energy Center into a vibrant, globally recognized preeminent center that expands the use of renewable energy and serves the needs of local, state and regional renewable energy industries and people. Oregon Tech and OREC focuses on applied research that falls within Technology Readiness Levels 3 – 7, and combines the capabilities of faculty, graduate and undergraduate students working with companies that want to move beyond basic research to prototype development, testing and simulations in relevant environments, and applicability of designs to manufacturing processes. OREC is a perfect demonstration of Oregon Tech's support of faculty professional development through applied research that supports its teaching mission.
- 2. The Upper Klamath Basin Water Measurement Coordination Group** is charged by the Department of the Interior, Bureau of Reclamation to provide assistance with the evaluation of sites for the installation of improved water measurement. OIT's presence and reputation with the local community provides Reclamation a trusted and technical source for analyzing and recommending water

measurement solutions to the many problems associated with a current and future changing climate. Oregon Tech has entered into a grant agreement (approximately \$400,000) with the Bureau of Reclamation to facilitate improved water measurement in the Klamath Basin. The faculty and students in the Environmental Science Bachelor's Degree Program will engage to "facilitate on the Upper Klamath Water Measurement Coordination Group to improve water measurement in the basin; assist with the evaluation of sites for the installation of improved water measurement devices; implement and report on experimental hydrologic field measurements; assist irrigators/producers with hydrologic field measurements; develop and disseminate technical support videos and materials; and develop and facilitate multi-party lab user agreements." This funded initiative is yet another example of Oregon Tech's support of faculty (and students) to develop professionally through applied research.

Professional development activities for faculty include:

ACP/Dual Credit-

Oregon Tech embraces ACP/Dual Credit and incorporates this effort in the University Core Themes which guide the university in the fulfillment of its mission.

Faculty in academic departments are given the opportunity to participate as liaisons in Dual Credit and the University is looking at mechanisms by which these efforts will be captured on a much larger scale as professional development. Currently faculty are paid stipends for participation based on the number of teachers they interact with.

Summer Productivity Grants - During the summer 2016 the Provost's Leadership Team awarded 18 summer productivity grants totaling \$50,000 for a variety of professional development activities to be accomplished by October 1, 2016. The results were overwhelming not only in terms of development, but also additional acquisition of funds via outside grants. Two examples of work that have led to outside grant funding are listed here:

1. Proposal for Applied Behavior Analysis (ABA) training which resulted in an Oregon Talent Council grant for development of an ABA Autism Training program.
2. Proposal for Using Sustainable, Natural Pozzolans from the Eruption of Mt. Mazama for Soil Stabilization and Gravel Roadway Dust Mitigation, which resulted in an NITC grant.

RESEARCH ACTIVITY

Partnerships with other higher education institutions in the region and across the state, in a variety of research center collaborations, create opportunities for faculty and students to engage in cutting edge research and applications in a variety of fields. Some of these collaborative research opportunities are described in the Collaboration section above, as is Oregon Tech's underlying pedagogy of practical application of theory in real world situations.

COLLABORATION

There are a number of joint administrative, academic and governance efforts to maintain collaboration across institutions. Faculty at all public universities are represented at the Inter-Institutional Faculty Senate (IFS)

which is made up of elected senate representatives from each institution. The IFS serves as a voice for all faculties of these institutions in matters of system wide university concern. In addition

Oregon Tech engages in a number of collaborative initiatives with other universities and partners, as indicated below (*P* indicates Participation, *N/P* indicates Non-Participation):

Table 6: Oregon Institute of Technology Collaborative Initiatives Participation

Other University Collaborations	University Response
Public University Councils:	
Presidents Council	P
Provosts Council	P
Vice Presidents for Finance and Administration (VPFAs)	P
General Counsels (GCs)	N/P Oregon Tech does not have a General Counsel. Utilizes outside council as needed
Public Information Officers (PIOs)	P
Legislative Advisory Council (LAC)	P
Cooperative Contracting (<i>note: taking part in State contracts</i>)	N/P
Capital Construction Services	N/P
OWAN	P
NERO Network	P
RAIN	N/P
Orbis Cascade Alliance	P Oregon Tech Library Director is on board of directors
ONAMI	N/P
CAMCOR at UO	P (as needed)
Oregon Manufacturing Innovation Center (OMIC)	P with PSU, OSU, PCC
Oregon Renewable Energy Center and Geo-Heat Center (OREC)	P with other university energy research centers, depending on the project
National Institute for Transportation and Communities (NITC)	P with PSU, UO, University of Utah, University of South Florida
Population Health Management Research Center (PHMRC)	P with Klamath County Public Health and OHSU
Rural Health Initiative	P with Sky Lakes Medical Center and OHSU
STEM Partnerships: South Metro-Salem STEM Hub (SMSP) and Southern Oregon STEM Hubs, NASA Space Grant Consortium, MESA	P with 6 other higher education partners and 16 school districts for SMSP, including OSU/NASA

	P with SOU and two other higher ed partners and 5 school districts for Southern Oregon P with PSU for with MESA
Office of Academic Agreements	P - Articulations agreements with 25 community colleges in Oregon and nearby states and dual enrollment agreements with 5 community colleges
Academic Agreements	P with PSU for engineering and with SOU for Applied Psych/Applied Behavior Analysis

Oregon Manufacturing Innovation Center (OMIC R&D)

OMIC R&D is an ambitious industry-university collaboration aimed at shaping the future of manufacturing in the State of Oregon. This applied research center brings together industry, government and academia as partners. Ten founding institutions—seven industry and three university members—signed a multi-year collaboration agreement in June 2017. Industry includes Boeing, Daimler, Hangsterfer’s, Vigor, ATI, Silver Eagle and Blount. Universities include the Oregon Institute of Technology, Portland State University (PSU), and Oregon State University (OSU). Each member brings financial investment to the table to support shared research projects.

The wider OMIC community includes a variety of government and private entities as stakeholders and key partners in the initiative including: the UO as an education partner, Oregon Legislature, the Office of the Governor, Oregon Employment Department, Business Oregon, Greater Portland Inc., AFL-CIO, Columbia County, and the City of Scappoose among others. The State of Oregon has made a significant investment in the past legislative session to support the work of OMIC R&D.

The university partners are working on applied research projects as directed and funded by the member manufacturing companies. In addition, the academic partners are providing learning opportunities and pathways for students and professionals. Significant machinery has already been donated by new members toward OMIC R&D. All partners benefit from the sharing of equipment, space and inter-institution expertise.

OMIC is a perfect demonstration of Oregon Tech’s leadership in applied research that supports its teaching mission. Oregon Tech had the flexibility and drive to work through complex logistical obstacles and relationships to collaborate with industry, government and academic partners to bring OMIC to fruition. Oregon Tech has taken on a significant role as the Host institution in support of the operation of OMIC R&D, as well as the co-owner of the Scappoose industrial site that will house the R&D activity.

- 1. Oregon Tech collaborates with other Oregon postsecondary institutions through many avenues.** Most visible are our dual enrollment agreements, reverse transfer work, articulated pathways (articulation agreements) and our partnership with STEM Hubs and Regional Promise Grants.

The University has dual enrollment agreements with Klamath, Chemeketa, Portland, Clackamas and Mt. Hood Community Colleges. Through these agreements students are able to be admitted to each institution using their total credits for a term to count for financial aid without an individual manual consortium agreement. Students have the freedom to take course at one or both institutions. Students who are dual can view their degree audit, have access to advisors, can utilize library and other services electronically or in person. Close to 2500 students have participated in this opportunity and 183 are currently enrolled in Oregon Tech courses.

Reverse transfer agreements provide the opportunity for Oregon Tech to forward the Oregon Tech transcripts of students who are close to an associate degree to the Community College where they evaluate it for degree completion. Many students have been awarded an associate degree after they transferred to Oregon Tech through these agreements.

Oregon Tech has been developing Articulated Pathways or Articulation agreements for over 30 years. These formal agreements require the faculties to do the difficult work of curricular alignment. Through these program to program documents, students can readily see how their credits will transfer and be able to plan effectively toward their educational goal. Since the curricula often change the agreements are reviewed and renewed yearly. This also allows the alignment discussions to be ongoing and robust. Oregon Tech partners with all Oregon Community Colleges in creating Articulation agreements that are appropriate and advantageous. Agreements are easily accessible on the Oregon Tech web site and also are posted on the Community College web page. Each agreement spans up to 3 catalog years and to date 137 agreements are in place. Additionally, Oregon Tech maintains transfer guides for our popular majors from feeder Community Colleges.

PATHWAYS

One area of collaboration that does present some challenges, both in Oregon and nationally, is student transfer success. The statutes outlining goals for transfer student success and cooperation between Oregon's higher education sectors (ORS 341.430 & ORS 348.470) are the framework for HECC's continued partnership with the seven public universities. Recent policy discussions between the institutions and HECC give this sustained work a renewed focus: more and better statewide data on transfer student outcomes and potential statewide solutions where persistent barriers exist.

Although Oregon has good state level policies and processes to ensure that students may apply credits earned upon transfer from community college to university (the Associate of Arts Oregon Transfer degree, for example), research that resulted from House Bill 2525 (2015) revealed that community college transfer students on the whole often face challenges in completing an intended major, which result in excess accumulated credits, increased tuition costs, and debt. Statewide, community college transfer students graduate with more "excess" credits than their direct entry counterparts. And despite the best efforts of advisors, faculty, and administrators, some students who complete statewide degrees such as the AAOT are ill-served if

they transfer into certain majors. Credit requirements at the university level can change without notice, which can hinder community college students and advisors in effective degree planning.

Statewide, 41 percent of students entered who entered an Oregon public university in Fall 2016 did so from a community college or other transfer institution.⁸ [Oregon Tech enrolled nearly 61 percent of its students as transfers in that same period.

Oregon Tech participated in many statewide transfer student success initiatives, including the HB 2525 workgroup – contributing key research and shaping the final report. Oregon Tech recently concluded a three-year effort to remake its university general education core around a set of institutional learning outcomes, similar to the AAC&U LEAP Essential Learning Outcomes. This project was in part spurred by the need to make transfer pathways more visible to students and advisors. Oregon Tech, as a transfer serving institution, works closely with its community college partners: Klamath Community College, Rogue Community College, and Portland Community College (among others). Oregon Tech has recently begun investigating joining Western Oregon and Blue Mountain Community College in the Interstate Passport (<http://www.wiche.edu/passport>), a learning outcomes based framework for lower division general education transfer.

In the 2017 legislative session, House Bill 2998 passed, which required the Commission to work closely with both public universities and community colleges to create a new framework for statewide transfer, a Foundational Curriculum of at least thirty credit hours, and a process for the creation of Unified Statewide Transfer Agreements (USTA) in major fields of study to aid transfer students in moving more easily into university study, with fewer lost or excess credits.

OIT representatives have been advisors and participants to the HB 2998 implementation process, adding insight and value to the creation of a proposed foundational curriculum currently under review and the policy questions that have been generated by the bill and reviewed in the legislative report that will result.

⁸ HECC Office of Research and Data, “University Student Data”
<http://www.oregon.gov/highered/research/Pages/student-data-univ.aspx>

Table 7: OIT, Admitted Undergraduate Enrollment by Entry Pathway Fall Fourth Week Enrollment

Year	Undergrad first time freshman		Undergrad Transfer		Total Admitted Undergraduate enrollment*
	N	%	N	%	
2016	1,320	38.8%	2,083	61.2%	3,403
2017	1,285	38.3%	2,069	61.7%	3,354

* Excludes graduate enrollment, non-admitted undergraduate enrollment, and post-baccalaureate enrollment.

NB: These are data from SCARF source for all percentages.

SHARED ADMINISTRATIVE SERVICES

Oregon Tech also engages collaboratively in a number of administrative services with other universities and partners, as indicated in the table below. (P indicates participation; NP indicates)

Table 8: Shared Administrative Services

Provider	University Response
University Shared Services Enterprise (USSE, hosted by OSU)	
Financial Reporting	P
Capital Asset Accounting (currently only OIT)	P
Payroll & Tax Processing (includes relationship w PEBB, PERS/Federal retirement*)	P
Collective Bargaining *	P
Information Technology/5 th Site ¹	P (Currently restricting)
Treasury Management Services:	
Legacy Debt Services-Post Issuance Tax Compliance	P
Legacy Debt Services-Debt Accounting	P
Non-Legacy Debt Services	P
Bank Reconciliations (and other ancillary banking services) ²	P
Endowment Services	P
Other Miscellaneous Statements of Work:	
Provosts Council Administrative Support	P

Legislative Fiscal Impact Statement Support	P
Risk Management Analyst (TRUs only)	N/A
Public University Fund Administration ³	P
University of Oregon	
Retirement Plans *	P
Legacy 401(a) Plan	P
Legacy 403(b) Plan	P
Optional Retirement Plan (ORP)	P
Tax-Deferred Investment (TDI) Plan	P
SRP Plan	P
Public University Risk Management and Insurance Trust (Risk Management)	P

Stemming from the passage of SB 270 and the University Shared Services Workgroup of 2013, as well as subsequent legislation found in ORS 352.129, the seven public universities created the University Shared Services Enterprise (USSE), a service center hosted by Oregon State University. USSE offers a fee for service model for many back-office functions previously offered by the OUS Chancellor's Office. ORS 352.129 mandates participation by the independent universities in certain services offered by USSE until July 1, 2019. These mandated services include group health insurance, a select set of group retirement plans, and collective bargaining. All universities, including Oregon Tech, continue to participate in these mandated services.

FINANCIAL METRICS

This section of Oregon Tech’s evaluation includes an overview of key high-level financial ratios which are viewed as “industry standard” metrics for understanding the strength of a public institution’s balance sheet and its operating performance. These ratios cannot be viewed in isolation from each other, or as a single snapshot in time, but as a continually unfolding story. Like any entity, Oregon Tech’s ability to fulfill its mission is dependent on its long-term financial health. The financial ratios examined in this section provide information on the financial flexibility possessed by the institution at the balance sheet date and yearly operating results compared to the size of the enterprise. Both types of measures should be understood in the context of the institution’s overall strategy and its capacity to effectively execute on that strategy.

Standard benchmarks for each ratio are presented alongside calculated ratios for the institutions. These benchmarks are for demonstration purposes only. It is important to recognize the best comparison in assessing financial stability for an institution may not be peer institutions or national benchmarks, but may be a comparison to the institution itself over time.

In some cases, the effort of tracking institutional financial stability through ratios is complicated by changes in accounting standards and practices. For example, effective in the 2014-15 fiscal year (FY 15), Governmental Accounting Standards Board (GASB) Statement No. 68 attempts to improve pension-related accounting and financial reporting. This change in the presentation of pension-related financial information impacts all of the ratios used in this evaluation. As such, the ratios are presented in two different ways: inclusive of the impacts of GASB 68 and exclusive of those impacts.

We should also note at the outset that Oregon Tech’s ratios for FY 16 differed slightly from those submitted to the HECC last year. This was because, according to OIT, their books were not closed at the time they submitted the ratios to the HECC last year. Such restatements are not a concern unless data is changing dramatically or data is routinely updated after the conclusion of the evaluation process, neither of which applies to this modest, single-year data update.

The following narrative focuses on the ratios provided by OIT to the HECC both with and without GASB 68. Ratios without GASB 68 are presented for reference at the end of this section:

OREGON TECH RATIOS WITH GASB 68				
Ratio	FY 15	FY 16	FY 17	Benchmark
Viability Ratio	57.22%	71.07%	81.25%	>125%
Primary Reserve Ratio	42.63%	40.97%	41.33%	>40%
Net Operating Revenues Ratio	-3.06%	-0.07%	-0.47%	>4%
Return on Net Assets Ratio	12.49%	92.67%	8.21%	>6%
Debt Burden Ratio	4.54%	5.04%	4.41%	<5%

The viability ratio measures one of the most basic elements of financial health: expendable net assets available to cover debt should the institution need to immediately settle its obligations. Ideally an institution would have enough expendable resources immediately available to more than cover debt. OIT’s viability ratio has

improved over the past two years, although it still falls short of the benchmark. Creation of additional debt could slow progress on this improving metric and should, therefore, be carefully considered and monitored by the institution.

The primary reserve ratio compares expendable net assets to total expenses, providing a snapshot of how long the institution could continue operations without the ability to generate revenues from those continuing operations. A trend analysis of the primary reserve ratio indicates whether an institution has increased its net worth relative to the rate of growth in its operating size. Oregon Tech’s primary reserve ratio has been stable over the past three years and at a level just slightly above the established benchmark. This indicates that OIT is successfully matching the growth of operating expenses with revenues.

The net operating revenues ratio indicates whether total operating activities for the fiscal year generated a surplus or created a deficit. It attempts to demonstrate whether an institution is living within its available resources. OIT has shown a negative net operating revenues ratio for the past three years, although the overall trend from FY15 to 17 is positive and the losses in FYs 16 and 17 were very small. This indicates that OIT is maintaining its capacity for a strong fund balance, and is capable of making strategic operating investments.

The return on net assets ratio demonstrates whether an institution is financially better off than in previous years. It shows an institution’s total economic return. A positive return on net assets ratio means an institution is increasing its net assets and is likely to have increased financial flexibility and ability to invest in strategic priorities. A negative return on net assets ratio may indicate the opposite, unless the negative ratio is the result of strategic investment in strategies that will enhance net assets in the future. OIT showed a dramatic increase in its return on net assets ratio in FY16, primarily derived from accounting changes and does not allow for comparison to prior years. Specifically, debt associated with Article XI-G, Article XI-Q, COPs, and lottery bonds were shifted off OIT’s balance sheet to the State of Oregon’s due to the reorganization of the former Oregon University System, dramatically improving OIT’s return on net assets for FY16. OIT’s return on net assets ratio remained above the benchmark in FY 17, indicating that it has sufficient flexibility and ability to invest in strategic priorities.

Debt burden ratio demonstrates two factors: the extent to which an institution has used borrowed funds to finance its mission; and the relative cost of institutional borrowing to total operating expenditures. OIT’s debt burden ratio rose very slightly above the standard benchmark of 5% in FY16 but dropped below that level in FY 17. This indicates that OIT is not overly relying on debt to finance its mission and is balancing its level of debt to its total operating expenditures.

The ratios presented in the table below reflect financial statements excluding the impact of GASB 68. They are provided for reference:

OREGON TECH RATIOS WITHOUT GASB 68				
Ratio	FY 15	FY 16	FY 17	Benchmark
Viability Ratio	59.00%	85.00%	86.00%	>125%
Primary Reserve Ratio	43.00%	53.00%	45.00%	>40%
Net Operating Revenues Ratio	-7.37%	6.51%	2.24%	>4%
Return on Net Assets Ratio	5.61%	100.41%	9.82%	>6%

Debt Burden Ratio	4.97%	5.41%	4.54%	<5%
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BOARD OF TRUSTEES

The Boards of Trustees at each public university and their respective university constituents are continuing the process of developing effective working relationships. The Commission continues to recommend that the areas that all Boards should be attentive to include timing and access, for example not scheduling meetings during exams, or when classes are not in session; and encouraging feedback by making an effort to allow non-board members to weigh in early on in the meetings rather than having to sit out the whole meeting. At each Board of Trustees meeting as well as during the Finance & Facilities Committee faculty leadership is allotted a time to speak directly with the Board. Further, at many meetings members of the faculty have provided presentations individually or in conjunction with members of executive leadership.

The Board of Trustees held meetings on the following dates:

- October 3, 2016
- November 15-16, 2016
- February 23-24, 2017
- May 8, 2017
- May 25, 2017
- October 26, 2017

The Board of Trustees proposed meetings for the remainder of 2017 and for 2018 include:

- December 7-8, 2017
- March 22, 2018
- May 17, 2018
- November 15, 2018

<http://www.oit.edu/trustees/meetings-events>

Public notices, agendas and meeting materials were posted on the Board's webpage and emailed to media, Foundation Board members, Alumni Committee members, faculty, staff, students, and other interested parties in advance of each meeting.

<http://www.oit.edu/trustees/meetings-events> Board meetings are duly noticed, and publicized. All meetings, except for executive sessions as allowed by law, are open to the public, live-streamed, recorded and available for viewing on the Board's webpage. Meeting agendas, materials, and copies of materials distributed or shown at meetings are posted on the Board's webpage. The Board complies with public records requests, in coordination with the University Board Secretary and Records Coordinator, in compliance with public records law.

<http://www.oit.edu/trustees/meetings-events/recordings>

The Board of Trustees adopted Bylaws on January 1, 2015. The document is published on the Board's webpage.

<http://www.oit.edu/docs/default-source/board-of-trustees-documents/2015-meetings/january/adopted-bylaws-22jan15.pdf?sfvrsn=2>

The founding Board created and signed a Values Statement. Each new Trustee reviews and signs an individual statement, agreeing to abide by the values.

<http://www.oit.edu/trustees/members>

The Board established a standing Finance & Facilities Committee that also acts as the Audit Committee.

The Board and the F&F Committee receive regular reports from the VPF&A including budget, investments, debt finance, tuition and fees, real property, personal property and risk management.

The Board adopted policies on board committees and their responsibilities, debt management, delegation of authority reserving authority for certain transactions, operating budget fund balance, ethics and conflict of interest, performance of official business, presidential performance process, and tuition and fee setting process.

The Board approved Resolutions on shared governance, establishing responsibilities of individual trustees including fiduciary responsibilities, and adopting the University mission statement and core themes. (See all governing documents that are posted on the Board's webpage: <http://www.oit.edu/trustees/bylaws-policies>).

The Board adopted a Policy on Tuition and Fee Process on February 22, 2016 and amended the policy on June 30, 2016. The Policy calls for a Tuition Recommendation Committee made up of six students representing both campuses appointed by the ASOIT Presidents; and the chair of the Fiscal Operations Advisory Council with support from senior administrators. A minimum of one public forum, with broad notification, is required at each campus location to discuss and obtain input.

November 15, 2016 the Board appointed Dr. Nagi Naganathan as the 7th president of Oregon Tech. Dr. Naganathan started his Presidency at Oregon Tech on April 1, 2017. The Board approved Dr. Naganathan's goals for the AY2017-18 at the October 26, 2017 meeting. He will address his progress on meeting those goals in his annual self-assessment due August 1, 2018 or another date agreed upon by the Chair and Vice-Chair.

The Board adopted the mission statement and core themes of the university on July 9, 2015 and amended the mission statement on June 8, 2016. The university's mission statement was forwarded to the HECC on June 8, 2016 for its approval on June 9, 2016.

The Board forwarded recommendations of approval to the HECC via the Provost's Council for a Bachelor of Science in Professional Writing on February 24, 2017 and a Master's in Applied Behavior Analysis on Mar 3, 2017.

Oregon Tech complies with ORS 352.025(2)(c). In 2016-17 OIT in partnership with the Oregon Business Development acquired Property in Scappoose, Oregon, acquired on November 1, 2016 is held in the name of the State of Oregon, acting by and through the Board of Trustees of the Oregon Institute of Technology

CONCLUSION

This report is guided by Oregon Revised Statute (ORS) 352.061 which requires that the HECC report on the university's achievement of outcomes, measures of progress, goals and targets; assess the university's progress toward achieving the mission of all education beyond high school, described in the 40-40-20 goal; and assess how well the establishment of its governing board comports with the findings of ORS 352.025. This report relies heavily on regularly-conducted academic accreditation reports and the self-assessments prepared for these accreditation reviews, as well as on state and federal data. The contents of this report signal areas of alignment with the HECC Strategic Plan, which in turn supports the objectives of higher education for the State of Oregon.

The Northwest Commission on Colleges and Universities (NWCCU) last affirmed accreditation for Oregon Tech in Spring 2016 following its Year Seven Evaluation. Oregon Tech has addressed the first of two recommendations from that review and submitted an Ad Hoc report in Fall 2017 to document compliance for the second. Oregon Tech is on track with its accreditation cycle.

At least three trends emerge from a review of Oregon Tech's student data: growing enrollment, increasing diversity, increasing numbers of degrees awarded and a continuing achievement gap for underrepresented students. Over the last decade, Oregon Tech's total enrollment has grown by more than 57.7% (from 3,318 in 2007 to 5,232 in 2016). Much of that growth has been concentrated in Oregon Tech's non-resident population, which has increased 100% over the time period, compared to a 47% increase in resident enrollment. However, 75% of students enrolled at Oregon Tech in Fall 2015 were Oregon residents.

After a decade of enrollment increases, Fall 2017 saw continued, strong enrollment growth: 1.1% decrease for non-residents, 6.9% increase for resident students, and 4.9% in total enrollment. Over a ten-year period, total enrollment is up 55.7%, and 40.4% since 2011. OIT awarded 2.4% more degrees in 2016-17 than the prior year, continuing a positive growth trend that began in 2013. While the six-year graduation rate for Pell Grant recipients (54.2%) is slightly better than the overall population (53.5%), underrepresented minority students lag the institutional average by 15 percentage points (38.6%). The number of underrepresented minority students enrolled at OIT continues to increase, and has grown by 37% since Fall 2013.

Oregon Tech maintains an increasing trajectory in the number of degrees awarded and an increase of 7% in the number of students graduating in 2016 compared to the year before. However, while graduation rates for Pell Grant recipients match those of the overall population, underrepresented minority students lag the institutional average by ten percentage points. Of underrepresented minorities, Hispanic students and underrepresented students who identify as belonging to two or more races were the only ones to see a significant improvement in degree completion. Other under-represented groups essentially remained flat or declined.

Partly as a result of state funding cuts, resident undergraduate tuition and fees at Oregon Tech increased 53.8% in the last 10 years, including increases of 4.5% and 3.0% in 2015-16 and 2016-17 respectively. The total cost of attendance for students includes significant expenses associated with housing, food, transportation, and textbooks. Oregon Tech estimates the average student budget for living expenses annually – \$12,455 for the 2016-17 academic year – an amount which exceeds resident tuition.

In addition to need-based federal and state financial aid programs (Pell and the Oregon Opportunity Grant), Oregon Tech students benefit from significant commitment of institutional resources to scholarships, remissions, and tuition discounts. Of Oregon Tech students who leave the university with federal loan debt, their average federally-backed debt load is \$25,323.

As noted at the outset, this report constitutes a benchmark against which to evaluate Oregon Tech's progress in the coming years. It does not strive to be a comprehensive evaluation of this complex and multi-faceted university; rather, it emphasizes several areas that are of particular importance to the HECC and to the State of Oregon today. In partnership with institutional leadership, legislators, and other stakeholders, the HECC will continue to consider modifications to this annual process and product in order to improve its usefulness to our universities and to the people of Oregon.

