HIGHER EDUCATION COORDINATING COMMISSION
255 Capitol Street NE, Salem, OR 97310
www.oregon.gov/HigherEd

Higher Education Coordinating Commission

DAVID RIVES
Chair

SANDY ROWE
Vice-Chair

TAYO AKINS

VANESSA BECKER

TERRY CROSS

RAMON RAMIREZ

LARRY ROPER

CARMEN RUBIO

DUNCAN WYSE

Non-voting members

LEE AYERS-PREBOSKI

ENRIQUE FARRERA

FRANK GOULARD

SHELBY PICK

ROSSY VALDOVINOS TORRES

Executive Director
BEN CANNON

AGENDA

December 12, 2019
9:00 A.M. – 3:30 P.M.

Public Service Building, 3rd Floor
Conference Room H301
255 Capitol St, NE
Salem, OR 97301

To listen, call: 888-273-3658, Access Code: 5934430

PLEASE NOTE starting in June 2019, the Commission moved to paperless meetings for sustainability and efficiency. Please access materials on our website. See more details below.

Persons wishing to testify during the public comment period should sign up at the meeting. Times approximate and order of agenda items may vary.

Standing Business

9:00	**1.0**	**Preliminary and Organizational Business**	Chair Rives
	1.1	Roll Call, Opening Remarks, and Agenda Review	
	1.2	**ACTION ITEM:** Approve November 7 Meeting Minutes	
9:10	**2.0**	**Executive Director Report**	Ben Cannon, HECC
	2.1	HECC Monthly Budget Update	
	2.2	Other Updates	
9:25	**3.0**	**Governor's Office Report**	Debbie Koreski, Office of Governor Kate Brown
9:40	**4.0**	**Public Comment**	
	4.1	*Each individual/group will have a time limit of three minutes, or as determined by the Chair*	
	4.2	Invited Testimony: Oregon Community College Association, Inter-institutional Faculty Senate, Oregon Alliance of Independent Colleges and Universities, Oregon Student Association, Oregon Council of Presidents, Oregon Education Association, Oregon Workforce Partnership, AFT-Oregon	
	4.3	Other Public Comment	
10:10	**5.0**	**University Program Approvals**	
	5.1	**CONSENT ITEM:** Eastern Oregon University: Bachelor of Arts/Bachelor of Science/Bachelor Arts and Science in Sustainable Rural Systems	
	5.2	**CONSENT ITEM:** Oregon State University: Bachelor of Music	
	5.3	**CONSENT ITEM:** Oregon State University: Bachelor of Science in Biological Data Science	
10:15	**6.0**	**Legislative Update**	
	6.1	2021 Budget and Policy Development Timeline	Ramona Rodamaker, HECC Kyle Thomas, HECC

All meetings of the Higher Education Coordinating Commission are open to the public and will conform to Oregon public meetings laws. A request for an interpreter for the hearing impaired or for accommodations for people with disabilities should be made to the Commission Administrator, Karen Lynne Howard, at (503) 947-2379 or by email at Karen.lynne.howard@state.or.us. Requests for accommodation should be made at least 72 hours in advance. Staff respectfully requests that you submit 25 collated copies of written materials at the time of your testimony. Persons making presentations including the use of video, DVD, PowerPoint or overhead projection equipment are asked to contact board staff 24 hours prior to the meeting. All HECC meeting materials are posted on the HECC website prior to each Commission meeting; only the agenda will be provided in print at meetings. If you require a paper copy due to accessibility reasons, please contact Karen Lynne Howard.

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Special Business

10:30	**7.0**	**North Lake County Boundary Change Motion**	
	7.1	**ACTION ITEM:** Issue order to remove portions of Lake County from COCC and annex it to KCC	Kyle Thomas

Leadership and Strategy

10:45	**8.0**	**HECC Strategic Plan**	Ben Cannon
	8.1	Outreach update	

Strategic Implementation

11:00	**9.0**	**Strategic Activity One: Reporting**	
	9.1	HECC 2019 Key Performance Measure (KPM) Report	Amy Cox, HECC
	9.2	Public University Evaluation Drafts (WOU, SOU, EOU, OIT)	Veronica Dujon, HECC
12:00		**Lunch**	

Strategic Implementation - Continued

12:30	**9.0**	**Strategic Activity One: Reporting - Continued**	
	9.3	**ACTION ITEM:** Oregon Opportunity Grant Evaluation and Report	Juan Baez-Arevalo, HECC Erin Pischke, HECC Susan Degen, HECC
1:15	**10.0**	**Strategic Activity Two: Funding**	
	10.1	**ACTION ITEM:** 2020 Public University Capital Recommendations (*Upon recommendation from F&A Subcommittee)*	Jim Pinkard, HECC
1:45	**11.0**	**Strategic Activity Three: Pathways**	
	11.1	Career and Technical Education State Plan	Donna Lewelling, HECC
	11.2	**ACTION ITEM:** STEM Council Legislative Report	Julia Steinberger, HECC
	11.3	**ACTION ITEM:** Postsecondary Student Transfer Report (HB 2998, 2017)	Kia Sorensen, HECC
	11.4	**ACTION ITEM:** Credit for Prior Learning Annual Report	Cat McGrew, HECC

Other Business

3:15	**12.0**	**Oregon Administrative Rules**	
	12.1	**ACTION ITEM:** Approve Permanent Rule Chapter 575: Oregon Promise	Bob Small, HECC
	12.2	**ACTION ITEM:** Approve Permanent Rule Chapter 575: Oregon National Guard Scholars Program	Bob Small
	12.3	**ACTION ITEM:** Approve Temporary Rule Chapter 715: Temporary Closure, Private Career School	Sean Pollack, HECC
3:30		**Adjourn**	

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BEN CANNON

November 7, 2019
9:00 A.M. – 2:00 P.M.

Public Service Building, 3rd Floor
Conference Room H301
255 Capitol St, NE
Salem, OR 97301

MEETING MINUTES:

Members Present: Chair David Rives; Vice-Chair Sandy Rowe; Tayo Akins (phone); Lee Ayers-Preboski; Vanessa Becker; Terry Cross (phone); Enrique Farrera (phone); Frank Goulard; Larry Roper; Carmen Rubio; Duncan Wyse
Excused: Shelby Pick, Rossy Valdovinos Torres

1.0 Preliminary and Organizational Business

1.1 Chair Rives called the meeting to order at 9:01. The Commission Administrator called roll.

1.2 Approve October 8 and 9 Meeting Minutes
ACTION ITEM
Motion: Chair Rives called for a motion to approve the October 8 and 9, 2019 Meeting Minutes as presented in item 1.2. Commissioner Becker moved adoption and Commissioner Ramirez seconded. Chair Rives called for a voice vote. The motion was approved unanimously.

2.0 Executive Director Report

2.1 HECC's Monthly Budget Update was provided.

2.2 Ben Cannon updated the Commission on potential agency move to new office space and announced new HECC hires, Rudyane Rivera-Lindstrom, Director for Diversity, Equity, and Inclusion (DEI) and Terry Rogers, Chief Audit Executive.

3.0 Governor's Office Report - *cancelled*

4.0 Public Comment

4.2 Invited Testimony
Tad Shannon, Oregon Education Association
Cindy Robert, Oregon Alliance of Independent Colleges and Universities
Dana Richardson, Oregon Council of Presidents
Jim Salt, OEA Community College Council

4.3 Other Public Comment
None

5.0 2019 Administrative Rules Report

Kyle Thomas presented to the Commission a statutorily required report summarizing all rules adopted, amended, repealed, or suspended by the HECC during the preceding 12-month period, for submission to the Legislative Assembly.
ACTION ITEM
Motion: Chair Rives called for a motion to approve the 2019 Administrative Rules Report as presented in item 5.0. Commissioner Wyse moved adoption and Commissioner Duncan seconded. Chair Rives called for a voice vote. The motion was approved unanimously.

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6.0 HECC Strategic Plan 2017-21

6.1 2017-21 Strategic Initiative Tracker
Director Cannon updated the Commission on key initiatives underway within each of the Commission's strategic action areas, which focuses on newer, strategic initiatives for which the Commission itself is expected to play a crucial decision-making and leadership role. Director Cannon noted that the tracker will be updated and redesigned for the February, 2020 meeting.

7.0 HECC Strategic Plan 3.0

7.1 Director Cannon provided an update on HECC's Strategic Plan 3.0

7.2 Oregon Workforce and Talent Development Board (WTDB) Strategic Plan
Todd Nell and Anne Mersereau, Oregon Workforce Talent Development Board, presented the 2020-2021 WTDB Strategic Plan, which is designed to help maintain and increase workforce system funding streams through more thoughtful alignment and legislative strategy.

8.0 Strategic Activity Two: Funding

8.1 F&A Subcommittee Report
Jim Pinkard and F&A Subcommittee Chair Duncan Wyse updated the Commission on the subcommittee's meeting November 6, 2019, including items related to university capital recommendations and the evaluation of the formula by which the HECC allocates state funding (the Public University Support Fund) to universities, known as the Student Success and Completion Model (SSCM).

9.0 Strategic Activity Three: Pathways

9.1 Patrick Crane and Cat McGrew updated the Commission on HECC progress regarding the implementation of SB 3, 2019 (Applied Baccalaureate).

9.2 Veronica Dujon and Patrick Crane provided an overview of HECC's process for approving university and community college academic programs, including standards, staff analysis, key steps, and timelines.

9.3 Veronica Dujon briefed the Commission on the recent activities of the HECC's Oversight Committee for High School Based College Credit Partnerships, including its October 11, 2019 approval of new accelerated learning partnerships.

9.4 Amy Cox presented the Accelerated Learning in Oregon: Access and Impact Report (HB 4053), required annually by the Legislature.
ACTION ITEM
Motion: Chair Rives called for a motion to approve the HB 4053 (Accelerated Learning) Report as presented in item 9.4. Commissioner Roper moved adoption and Vice-Chair Rowe seconded. Chair Rives called for a voice vote. The motion was approved unanimously.

9.5 Wayne Fanno presented the 2019 National Career Readiness Certificate Program Legislative Report, required annually by the Legislature and the Governor.
ACTION ITEM
Motion: Chair Rives called for a motion to approve the 2019 National Career Readiness Certificate Report as presented in item 9.5. Commissioner Wyse moved adoption and Commissioner Becker seconded. Chair Rives called for a voice vote. The motion was approved unanimously.

10.0 Chair Rives adjourned the meeting at 1:55 PM.

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Materials

0.0 Agenda
1.2 ACTION ITEM: Approve October 8 and 9 Meeting Minutes
2.1 HECC Monthly Budget Update
5.0 2019 Administrative Rules Report Staff Summary
5.0a 2019 Administrative Rules Report
6.1 Strategic Initiatives Tracker Staff Summary
6.1a Strategic Initiatives Tracker
6.1b Strategic Framework
7.2 Oregon Workforce and Talent Development Board Strategic Plan Staff Summary
7.2a Oregon Workforce and Talent Development Board Strategic Plan
8.1 Funding and Achievement Subcommittee Report Staff Summary
9.1 SB3 Applied Baccalaureate Implementation Update Staff Summary
9.2 University Program Approval Process Overview Staff Summary
9.2a University Program Approval Process Overview Hybrid Program Delivery - April 11 2019
9.2b University Program Approval Process - SPC and OCOP Voluntary Agreement - May 2019
9.2c University Program Approval Process - Flow Chart
9.2d University Program Approval Process - Statues and Rules Related to Program Approval
9.2e Community College Program Approval Process Overview Staff Summary
9.2f Community College Program Approval Process Overview - Program Approval Quick Reference
9.2g Community College Program Approval Process Overview - CTE Program Approval Standards
9.3 Accelerated Learning Oversight Committee Actions Staff Summary
9.4 ACTION ITEM: HB 4053 Accelerated Learning Report Staff Summary
9.4a ACTION ITEM: HB 4053 Accelerated Learning Report Staff - forthcoming
9.5 ACTION ITEM: 2019 National Career Readiness Certificate Report Staff Summary
9.5a ACTION ITEM: 2019 National Career Readiness Certificate Report

HIGHER EDUCATION COORDINATING COMMISSION

2019 - 2021 Budget Execution

As of October 31, 2019

% of the Biennium Elapsed	17%

Category		Expenditures to Date	% Spent		19-21 Legislatively Approved Budget
Personal Services					
General Funds	$	3,602,637	23%	$	15,577,422
Other Funds		1,111,348	12%		8,949,767
Lottery Funds		-	-		-
Federal Funds		668,803	7%		9,586,565
Total Personal Services	**$**	**5,382,788**	**16%**	**$**	**34,113,754**
Services and Supplies					
General Funds	$	2,924,869	36%	$	8,187,284
Other Funds		79,544	1%		8,842,246
Lottery Funds		41	-		-
Federal Funds		135,468	2%		6,874,162
Total Services and Supplies	**$**	**3,139,922**	**13%**	**$**	**23,903,692**
Total Operating Expenditure	**$**	**8,522,710**	**15%**	**$**	**58,017,446**
Special Payments					
General Funds	$	598,393,533	31%	$	1,930,146,504
Other Funds		3,644,195	3%		137,026,908
Lottery Funds		13,731,160	14%		99,405,656
Federal Funds		7,963,443	6%		130,788,980
Total Special Payments	**$**	**623,732,332**	**27%**	**$**	**2,297,368,048**
Debt Service					
General Funds	$	55,331,095	24%	$	230,156,706
Other Funds		83,550,646	33%		250,139,524
Lottery Funds		-	0%		45,022,437
Federal Funds		-	0%		4,597,230
Total Debt Service	**$**	**138,881,741**	**26%**	**$**	**529,915,897**
Total	**$**	**771,136,783**	**27%**	**$**	**2,885,301,391**

Positions	*148*
FTE	*137.37*

THE OREGON STUDENT ASSOCIATION
635 NE Dekum St, Portland, OR, 97211
Phone: (503) 286-0477
www.orstudents.org

Dear Chair Rives and members of the Higher Education Coordinating Commission,

As the Legislative Director of the Oregon Student Association, I am writing in support of investing $12.9 million during the 2020 session to construct a Student Success Center on OSU-Cascades campus in Bend.

In 2017, OSU-Cascades students voted to use a portion of student fees to help fund the Student Success Center. Since then, students have raised over $1 million. With the help of student fee dollars, OSU-Cascades will invest a total of $5 million to the project. Not only does this show student's commitment to bettering the lives of current students, but future students as well. We support OSU Cascades' efforts to provide students the spaces and resources they need to thrive. It is time to invest in the expansion of student services now, so that we do not limit student access to necessary resources such as disability services, internship coordination, and academic and career advising.

With a population of 220,000 and a growing K-12 enrollment, access to a university education in Central Oregon has never been more critical. For rural, low-income, first-generation, and non-traditional students, the difference between attending college or not can come down to the location of a university within commuting distance. This is apparent when considering 60% of all OSU-Cascades students are from the Central Oregon region and 50% are Pell Grant eligible. Many of these students are place-bound and unable to attend other universities.

OSU-Cascades is home to 1,300 students and that number continues to grow each year. Currently, the campus has minimal space dedicated to helping students succeed--in the classroom or in the workforce. OSA advocates for the legislature to invest in students and in the resources and spaces they need to succeed. Research has proven student services increase graduation rates, reduces time to graduate, and connects students to future employment. The Central Oregon region has projected job growth at upwards of 15,000 jobs by 2027. Degrees earned at OSU Cascades will help ensure supply can meet demand.

OSA represents students who attend Oregon's public universities. Please make this critical investment during the 2020 legislative session, so that OSU-Cascades can continue to meet the needs of underserved students in an underserved region.

Sincerely,

Emily Wanous
Legislative Director
Oregon Student Association

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Docket Item:

University Program Approval: Eastern Oregon University, Bachelor of Art (B.A.), Bachelor of Science (B.S.), and Bachelor of Applied Science (B.A.S.) in Sustainable Rural Systems.

Summary:

Eastern Oregon University proposes a new degree program leading to a B.A., B.S., or B.A.S. in Sustainable Rural Systems. The statewide Provosts' Council has unanimously recommended approval. Higher Education Coordinating Commission (HECC) staff completed a review of the proposed program. After analysis, HECC staff recommends approval of the program as proposed.

Materials:

Academic program information.

Staff Recommendation:

Staff recommends the Commission move to approve the University Program Approval: Eastern Oregon University, Bachelor of Art (B.A.), Bachelor of Science (B.S.), and Bachelor of Applied Science (B.A.S.) in Sustainable Rural Systems.

EASTERN OREGON UNIVERSITY
UNIVERSITY GENERAL COUNSEL & BOARD SECRETARY

November 18, 2019

Northwest Commission on Colleges and Universities
8060 165th Avenue N.E., Suite 100
Redmond, WA 98052

Dear Commissioners,

At a regular meeting held on Thursday, November 14, 2019, the Board of Trustees of Eastern Oregon University reviewed and approved the following curriculum change:

- Establishment of Bachelor of Art (B.A.), Bachelor of Science (B.S.) and Bachelor of Applied Science (B.A.S.) degree in Sustainable Rural Systems.

For further information about the meeting and this academic program, please visit our website at https://www.eou.edu/governance/board-meetings/board-of-trustees-meeting-5/.

If you have any questions, please contact our office at 541-962-4101.

Sincerely,

Christopher L. Burford
University General Counsel and Board Secretary

One University Boulevard • La Grande, OR 97850-2807 • Voice: 541-962-4101 • Fax: 541-962-3113 • E-mail: cburford@eou.edu

Proposal for a New Academic Program

Institution: **Eastern Oregon University**

College/School: **College of Science, Technology, Mathematics and Health Sciences**

Department/Program Name:

Degree and Program Title: **BA/BS/BAS Sustainable Rural Systems**

1. **Program Description**

   a. Proposed Classification of Instructional Programs (CIP) number.

   CIP 30 MULTI/INTERDISCIPLINARY STUDIES and sub codes [e.g. 30.33 Sustainability Studies]

   b. Brief overview (1-2 paragraphs) of the proposed program, including its disciplinary foundations and connections; program objectives; programmatic focus; degree, certificate, minor, and concentrations offered.

      i) We are proposing the ***establishment of Bachelor of Art (BA), Bachelor of Science (BS) and Bachelor of Applied Science (BAS) degrees in Sustainable Rural Systems at Eastern Oregon University***. The BA/BS options for Sustainable Rural Systems carry requisite general education, elective, and institutional requirements in satisfaction of the degree. The BAS option for Sustainable Rural Systems requires an earned Associate of Applied Science (AAS) degree that is transferred in, plus satisfaction of 45 general education credits and satisfaction of all other upper division required elective and institutional requirements towards the degree.

      ii) We are proposing a new degree program named "Sustainable Rural Systems," in which students will learn about all the components that are needed for a functioning rural system. Interactions between these components will be studied as well as the interactions of rural systems with the global system. A key component of the degree program are multi-year, multi-disciplinary, authentic community projects in which students participate immediately after they enter the program, apply directly what they learned in the classroom, and take increasing responsibility for the projects. We have partnered with Baker Technical Institute (BTI) to incorporate their student-centered brownfields remediation program into our degree program as a first project type; it is expected that at later stages other multi-year community projects that are amenable to intense continual student involvement and that require integrating knowledge and skills from many academic disciplines will be added as needed and as they become available (in collaboration with community partners).

In the projects, students are working with external professionals on the projects; (e.g. in the brownfields projects, students identify sites, write assessment and subsequently clean-up grant applications, issue RFPs for work to be carried out, select contractors, and engage the community in the planning for repurposing of a clean site). To allow for effective student participation, curriculum and projects are entwined in a flexible manner to allow for meeting the needs of the projects as these unfold.

The program structure features a strong program core that will be taken by all students. The structure allows for ready addition (or removal) of concentrations as the program and projects evolve. For the start-up phase, two concentrations will be available, i.e. "Environmental Resources" and "Economics of Rural Systems." These are well-suited to support the first project, brownfield remediation. Other concentrations focusing on the many aspects of the health of rural communities will follow, as will others should new projects require these.

The emphasis on the core was chosen to allow for regular meetings and interactions of all students irrespective of their concentrations, so specific expertise acquired in the concentrations can be shared by students with all students in the program. For example, the projects seminar will bring together students in all years of their studies to take advantage of the peer mentoring that can readily occur in this format with focus on the project needs.

In their final year of studies, students will be able to focus for an entire term on management of the project(s). In fact, these students will form a project management team that will have substantial responsibilities for the execution of projects (with guidance by staff from EOU and project partners).

c. Course of study – proposed curriculum, including course numbers, titles, and credit hours.

See attached Check Sheets Appendices A, B, C & D for program requirements

d. Manner in which the program will be delivered, including program location (if offered outside of the main campus), course scheduling, and the use of technology (for both on-campus and off-campus delivery).

Program will be offered on campus; however, projects outside of our region would require partial distance instruction via live streaming.

e. Adequacy and quality of faculty delivering the program.

The program draws in part from existing EOU courses (see check sheets below), which current EOU faculty will continue to teach. A number of new courses will be developed and delivered in part by existing faculty who will transfer some part of their load to the new program. Existing programs will be held harmless, i.e. the missing load will be made up. New faculty dedicated to the new program will need to be hired.

f. Adequacy of faculty resources – full-time, part-time, adjunct.

For the start-up of the program, 2.5 faculty FTE are needed.

g. Other staff.

All EOU resources are available; specific program and project staff support will be provided initially predominately by the College of Science Technology, Mathematics, and Health Sciences, with other staff support coming from the College of Business and the College of Arts, Humanities, and Social Sciences. Some outreach support to primary and secondary schools will be supported by the College of Education.

h. Adequacy of facilities, library, and other resources.

All EOU resources are available to faculty and students.

i. Anticipated start date.
Fall Term 2020.

2. **Relationship to Mission and Goals**

a. Manner in which the proposed program supports the institution's mission, signature areas of focus, and strategic priorities.

This program fulfills multiple goals stated in EOU's Strategic Plan, i.e. Goal 1 (Student Success: Objective 1: All graduates engage in high-impact, experiential learning activities), Goal 2 (Transformational Education: Objective 2: Graduates possess the essential learning outcomes employers seek), Goal 3 (Grow the Number of Lives Impacted: Objective 1: Serve as a growing and thriving rural university), and Goal 5 (Relevance and Interconnection: Objective 2: Be recognized as a leader in promoting rural community prosperity and resilience).

b. Manner in which the proposed program contributes to institutional and statewide goals for student access and diversity, quality learning, research, knowledge creation and innovation, and economic and cultural support of Oregon and its communities.

In general, the program offers highly experiential learning that provides all of the essential (also called professional or soft) skills that employers demand from their workforce and that they expect from university graduates, such as communication competence (oral and written), professionalism and professional demeanor, ability to work in teams, ability to integrate knowledge from various disciplines, leadership, assumption of responsibility for team outcomes and accountability, flexibility, etc.

More specifically, the program will produce professionals with broad knowledge of all factors that are essential for the health and sustainability of rural communities and who have practical experience in identifying need designing, planning, fundraising, execution, and supervision of rural community projects.

As the program progresses, a body of research will accumulate based in part on the projects (e.g. through community surveys, environmental assessment, natural resource planning and sustainable usage, supported community activities, etc.) that may provide important general approaches and conclusions for rural systems everywhere.

Moreover, as part of the project team and through the project seminar, external professionals will interact with the students to provide direct exposure to operation, processes, procedures, etc. in companies, agencies and organizations. Interactions with external professionals will also lead to applied research findings that could be shared broadly.

EOU will support faculty research and development through existing programs such as the "Faculty Scholars Grant" and the "Faculty Development Grant."

Manner in which the program meets regional or statewide needs and enhances the state's capacity to:

i. improve educational attainment in the region and state;
ii. respond effectively to social, economic, and environmental challenges and opportunities; and
iii. address civic and cultural demands of citizenship.

The program is built around experiential learning and thus supports educational attainment by college students who thrive by the immediate practical and relevant context. Through the project- and team-based learning structure, students will actively build and practice the professional skills that are in much demand by employers.
The subject matter of the Sustainable Rural Systems degree is in perfect alignment with the needs of rural communities in all aspects. The degree program produces graduates who are ready to work creatively to build and sustain prosperity and health pf rural communities. Thus, the program provides a broadly trained, flexible workforce that can find employment in various role in municipalities, agencies, and organizations.
The program will produce graduates who as students will have engaged with the community through community projects. Students will interact will all interest groups and stakeholder that are relevant for the success of a project in particular, and who are critical for healthy communities.

3. **Accreditation**

a. Accrediting body or professional society that has established standards in the area in which the program lies, if applicable.

Northwest Commission on Colleges and Universities (NWCCU)

b. Ability of the program to meet professional accreditation standards. If the program does not or cannot meet those standards, the proposal should identify the area(s) in which it is deficient and indicate steps needed to qualify the program for accreditation and date by which it would be expected to be fully accredited.

Program will meet all NWCCU standards.

c. If the proposed program is a graduate program in which the institution offers an undergraduate program, proposal should identify whether or not the undergraduate program is accredited and, if not, what would be required to qualify it for accreditation.

Not Applicable.

d. If accreditation is a goal, the proposal should identify the steps being taken to achieve accreditation. If the program is not seeking accreditation, the proposal should indicate why it is not.

NWCCU notification will occur after HECC approval.

4. **Need**

a. Anticipated fall term headcount and FTE enrollment over each of the next five years.

Providing both a typical (BA/BS) and professional/technical (BAS) pathway to a bachelor's degree will maximize the student enrollment potential. All degrees will be attractive to students who seek immediate practical application of classroom learning; thus, the degree targets in addition to the "traditional" student type a hitherto underserved and somewhat different student type. However, every student type will benefit greatly from the experiential learning structure of the degree program.

The BAS degree in particular enables holders of Associate of Applied Science (AAS) degrees a streamlined path to graduation with a Bachelor of Applied Science degree. The BAS degree option reaches a hitherto underserved group of students by accepting technical credits and satisfying general education through a reduced number of credits to satisfy requirements for the bachelor's degree.

While all degree options are expected to train professionals, who enter the workforce after graduation, the BA/BS degree in particular lends itself as basis for entering professional Master's programs, e.g. in public administration, sustainable technologies, environmental monitoring, etc.

Given the novel innovative degree program and structure, enrollment predictions carry a larger than usual margin of error. As elaborated above, we do expect substantial interest from traditional and hitherto underserved student populations. Furthermore, an integral part of the degree program is the integration of high-school students (and their teachers) into project teams via cross-institutional career academies. While the exact structure and mechanisms for this integration and cooperation are still being discussed with regional high schools, we expect that this will encourage participating students to pursue a college education as they will have worked side by side with college students, and faculty, and professionals and thus will have direct experience of what college study is like.

Consequently, and with appropriate marketing, EOU expects a full-time cohort of 25.

b. Expected degrees/certificates produced over the next five years.

For BA/BS/BAS earners, it is expected that beginning in program year 3 the program will graduate 20+ students/year.

c. Characteristics of students to be served (resident/nonresident/international; traditional/ nontraditional; full-time/part-time, etc.).

This degree program is unique in the region, State, and Western United States. Thus, we expect this program to become a destination for all students who seek immediate practical application of classroom learning through authentic team-based projects and who seek to learn about and have positive impact on rural communities everywhere. Thus, the degree targets a somewhat different student type compared to the "traditional" student type (although the latter will benefit greatly from the experiential learning structure of the degree program).

d. Evidence of market demand.

There is a huge body of testimonials that employers demand from universities that their graduates possess, in addition to subject knowledge, the so-called soft skills (also referred to as professional or essential skills) such as communication competence (oral and written), professionalism and professional demeanor, ability to work in teams, ability to integrate knowledge from various disciplines, leadership, assumption of responsibility for team outcomes and accountability, flexibility, etc. In fact, many employers rank these higher than the subject knowledge, as the latter – at least in larger organizations – may be available through in-house training. The fact that the core of the proposed degree program is a team-based large project provides students extensive practical and authentic experiences in which they can learn and master all of the soft skills required in their future careers.

e. If the program's location is shared with another similar Oregon public university program, the proposal should provide externally validated evidence of need (e.g., surveys, focus groups, documented requests, occupational/employment statistics and forecasts).

N/A.

f. Estimate the prospects for success of program graduates (employment or graduate school) and consideration of licensure, if appropriate. What are the expected career paths for students in this program?

i) See e. Above.

5. **Outcomes and Quality Assessment**

a. Expected learning outcomes of the program.

This degree program provides an inter- and multidisciplinary approach to understanding rural systems and planning for sustainable rural communities. It provides the opportunity to synthesize and apply knowledge of the economic, political, environmental, and cultural aspects of a rural community. This program also provides an in depth understanding of sustainability as it applies to both rural and urban systems. The extensive project component creates the opportunity for students to collaborate with the broader community to solve problems and make informed decisions about policies and sustainable development. The integrated curriculum also teaches students to develop and apply critical thinking skills that allow them to creatively apply cultural

understanding, historical perspective, scientific information, and economic principles in policy development and decision-making.

Learning Outcomes:
Content Knowledge: Students will demonstrate a mastery of content knowledge within this new discipline. They will also demonstrate the ability to apply this content knowledge to problems in rural communities.
Creative Inquiry: Students will demonstrate the ability to gather information to design studies that provide scientific information and apply it creatively to planning of sustainable rural systems. They will also be involved with creative planning for projects that improve, restore, or create opportunities for sustainable resource use and economies in rural communities.
Integrated Learning through Critical Thinking: Students will learn to collect and analyze information about the sociological, economic, environmental, and political aspects of a rural system. The ability to critically assess various types of information will be practiced both in formal coursework and in the project setting.
Community and Civic Engagement: Students will engage with the broader community to solve problems unique to rural settings. They will be involved with restoration and sustainable development efforts with a variety of stakeholders to benefit the community.

At completion of the Sustainable Rural Systems degree program, the student will be prepared for life-long success in a variety of rural-based settings and careers via the ability to:

1. Develop a sense of rural communities through a broad understanding of the components of rural systems, including economic, societal, political, environmental, and historical aspects;
2. Understand and apply the concept of sustainability;
3. Synthesize relevant knowledge and skills in order to create positive change in the social, economic, political, environmental, and cultural aspects of rural communities;
4. Apply critical thinking, cultural understanding, and scientific information to real-life situations via project-based learning;
5. Evaluate how rural and urban communities interact with each other, both locally and globally;
6. Operate in collaboration with community stakeholders, both independently and in a team setting, to solve community problems and make informed decisions about policies and sustainable development.

b. Methods by which the learning outcomes will be assessed and used to improve curriculum and instruction.

The outcomes for each class will be clearly stated on the syllabus. Assessments for included courses will address both the conceptual and applied aspects of the class. Means of assessment will include projects, quizzes, and exams. The objectives for projects and other assigned work will tie directly into course outcomes.

c. Nature and level of research and/or scholarly work expected of program faculty; indicators of success in those areas.

Faculty, hired from graduate institutions or business and industry with advanced degrees, are evaluated for continuance and promotion based on teaching excellence, evidence of demonstrated application of research or scholarly work to the teaching and learning environment, and commitment to continuous improvement as demonstrated by KPI targets for participation in professional development and assessment of student learning outcomes.

The project courses will be offered by an EOU faculty member, who is responsible for instruction, content, and assessment, as well as project management activities that are the responsibility of EOU. This faculty member will assign student grades. Student assessment will be individualized but include to a large extent the contributions of an individual student to the student team and the project. This includes overall in interactions with and contributions to the team, such as timely delivery and quality of contributions/assignments expected by the project team, as well as readiness to assume responsibility for tasks that contribute to the project and the team.

6. **Program Integration and Collaboration**

a. Closely related programs in this or other Oregon colleges and universities.

This program is unique in the State of Oregon and in the Western United States.

b. Ways in which the program complements other similar programs in other Oregon institutions and other related programs at this institution. Proposal should identify the potential for collaboration.

This is a unique program in the State; however, the Environmental Resources concentrations already draws from courses offered by Oregon State University's College of Agriculture at the Eastern Oregon University campus. The program may draw from the courses offered by other Oregon public universities, particularly if community projects require specialized instruction not currently available at Eastern Oregon University.

c. If applicable, proposal should state why this program may not be collaborating with existing similar programs.

Not Applicable

d. Potential impacts on other programs.

The impact of the program on existing EOU programs is challenging to predict. The program is distinct from all other programs and provides access to a different range of careers. In particular, the program will not prepare students for graduate programs e.g., in the hard sciences and in health fields; those students will need to seek the existing preparation pathways. However, particularly in the initial implementation period, there

may be some movement of existing students from existing programs to the new program.

7. External Review

If the proposed program is a graduate level program, follow the guidelines provided in *External Review of New Graduate Level Academic Programs* in addition to completing all of the above information.

Not applicable, this is an undergraduate program.

Revised May 2016

APPENDICES:

Appendix A: Check Sheet	BA/BS Sustainable Rural Systems Environmental Resources Concentration
Appendix B: Check Sheet	BA/BS Sustainable Rural Systems Economics of Rural Systems Concentration
Appendix C: Check Sheet	BAS Sustainable Rural Systems Environmental Resources Concentration
Appendix D: Check Sheet	BAS Sustainable Rural Systems Economics of Rural Systems Concentration

BA/BS in Sustainable Rural Systems

Degree Program Check Sheet

I. Complete all Institutional Graduation Requirements (including University Writing Requirement, Diversity Requirement, General Education Requirements, etc.) as provided at: http://www.eou.edu/catalog/ [graduation requirements]
II. Program Requirements: Program has pre-requisite courses that are needed prior to beginning this degree path.
III. A grade of "C-" or better is required for each course counting towards the major, but a cumulative grade of C [2.00] is required for completion of the major.

Note: Listed courses provided by Oregon State University at Eastern Oregon University reflect the revised course offerings that are awaiting final approval.

Required Core Classes:

Course #	COURSE TITLE
SRS 201	Rural Society, Environment & Economy (4)
SCI 226	Environmental Science I & Lab (5)
SCI 227	Environmental Science II & Lab (5)
STAT 243	Statistics (4) *Prereq: Placement in Math 111*
	or
STAT 327	Statistics and Experimental Design (5)
WR 320	Professional Writing (3) [UWR] *Prereq: WR 121 or equivalent*
SRS 321	Rural Community and Economic Systems (4)
SRS 363	Rural Land Use and Development (4)
SRS 451	Natural Resource and Environmental Policy (4)
SRS 493	Response to Climate Change (4)

Core Total (37-38 credits)

Required Project Courses:

Course #	COURSE TITLE
SRS 215	Rural Systems Seminar (3)
SRS 316	Rural Systems Project I, II, III (6)
SRS 417	Project Leadership and Community Connections (12)

Project Total (21 credits)

Environmental Resources Concentration:

Course #	COURSE TITLE
GEOG 210	Intro to GIS (3)
SCI 328	Environmental Science III & Lab (5)
CSS 305	Principles of Soil Science (4)*
SCI 442	Sustainable Water Resources (4)

Choose two from the following list:

IAWS 131	Principles of Range Management (3)*&
AGRI 2XX%	Critical Issues in Oregon Agriculture & Natural Resources (3)* [online]
IAWS 330	Ecosystems I (3)*&
IAWS 331	Ecosystem II (3)*&
IAWS 430	Wildland Restoration (4)*
IAWS 435	Wildland Monitoring (4)*

*These courses are provided by Oregon State University (OSU) at the Eastern Oregon University Campus or online through OSU's E-Campus.
%Course number to be determined.
&These course names are in discussion and subject to change. Additional OSU courses applicable to this degree program may be offered.

Concentration Total (22-23 Credits)

Total Degree Requirements (80 credits minimum)

Project Coursework	21 credits
Degree Core Courses	37-38 credits
Concentration	22-23 credits

EASTERN OREGON UNIVERSITY

BA/BS in Sustainable Rural Systems

Degree Program Check Sheet

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	or
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WR 320	Professional Writing (3) [UWR] *Prereq: WR 121 or equivalent*
SRS 321	Rural Community and Economic Systems (4)
SRS 363	Rural Land Use and Development (4)
SRS 451	Natural Resource and Environmental Policy (4)
SRS 493	Response to Climate Change (4)
	Core Total (37-38 credits)

Required Project Courses:

Course #	COURSE TITLE
"SRS 215	Rural Systems Seminar (3)
SRS 316	Rural Systems Project I, II, III (6)
SRS 417	Project Leadership and Community Connections (12)
	Project Total (21 credits)

Economics of Rural Systems:

Course #	COURSE TITLE
ECON 345	Economics of Development (5)
ECON 355	Ecological Economics (5)
ECON 375	Environmental & Natural Resource Economics (5)
ECON 435	Public Finance (5)
	Concentration Total (20 Credits)

Total Degree Requirements (78 credits minimum)

Project Coursework	21 credits
Degree Core Courses	37 credits
Concentration	20 credits

BAS in Sustainable Rural Systems

Degree Program Check Sheet

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SRS 363	Rural Land Use and Development (4)
SRS 451	Natural Resource and Environmental Policy (4)
SRS 493	Response to Climate Change (4)

Core Total (37-38 credits)

Required Project Courses:

Course #	COURSE TITLE
SRS 215	Rural Systems Seminar (3)
SRS 316	Rural Systems Project I, II, III (6)
SRS 417	Project Leadership and Community Connections (12)

Project Total (21 credits)

Environmental Resources Concentration:

Course #	COURSE TITLE
GEOG 210	Intro to GIS (3)
SCI 328	Environmental Science III & Lab (5)
CSS 305	Principles of Soil Science (4)*
SCI 442	Sustainable Water Resources (4)

Choose two from the following list:

IAWS 131	Principles of Range Management (3)*&
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IAWS 331	Ecosystem II (3)*&
IAWS 430	Wildland Restoration (4)*
IAWS 435	Wildland Monitoring (4)*

*These courses are provided by Oregon State University (OSU) at the Eastern Oregon University Campus or online through OSU's E-Campus.
%Course number to be determined.
&These course names are in discussion and subject to change. Additional OSU courses applicable to this degree program may be offered.

Concentration Total (22-23 Credits)

Total Degree Requirements (80 credits minimum)

Project Coursework	21 credits
Degree Core Courses	37-38 credits
Concentration	22-23 credits

EASTERN OREGON UNIVERSITY

BAS in Sustainable Rural Systems

Degree Program Check Sheet

I. Complete all Institutional Graduation Requirements (including University Writing Requirement, Diversity Requirement, General Education Requirements, etc.) as provided at: http://www.eou.edu/catalog/ [graduation requirements]
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SRS 321	Rural Community and Economic Systems (4)
SRS 363	Rural Land Use and Development (4)
SRS 451	Natural Resource and Environmental Policy (4)
SRS 493	Response to Climate Change (4)
	Core Total (37-38 credits)

Required Project Courses:

Course #	COURSE TITLE
"SRS 215	Rural Systems Seminar (3)
SRS 316	Rural Systems Project I, II, III (6)
SRS 417	Project Leadership and Community Connections (12)
	Project Total (21 credits)

Economics of Rural Systems:

Course #	COURSE TITLE
ECON 345	Economics of Development (5)
ECON 355	Ecological Economics (5)
ECON 375	Environmental & Natural Resource Economics (5)
ECON 435	Public Finance (5)
	Concentration Total (20 Credits)

Total Degree Requirements (78 credits minimum)

Project Coursework	21 credits
Degree Core Courses	37 credits
Concentration	20 credits

Institution: Eastern Oregon University
Program: BA/BS/BAS in Sustainable Rural Systems

Action: At the **November 21, 2019** meeting, the Statewide Provosts Council approved a new program for **Eastern Oregon University, BA/BS/BAS in Sustainable Rural Systems,** Policy to move forward to the Oregon Higher Education Coordinating Commission for its review and approval. **The Eastern Oregon University** Board of Trustees approved the program at its **November 14th, 2019** meeting.

Eastern Oregon University
Sarah Witte, provost
_X_ Approved
__Opposed
__Abstained

Oregon State University
Ed Feser, provost
_X_ Approved
__Opposed
__Abstained

Portland State University
Susan Jeffords, provost
_X_ Approved
__Opposed
__Abstained

University of Oregon
Patrick Phillips, provost
_X_ Approved
__Opposed
__Abstained

Oregon Health & Science University
Elena Andresen, interim provost
_X_ Approved
__Opposed
__Abstained

Oregon Tech
Joanna Mott, provost
_X_ Approved
__Opposed
__Abstained

Southern Oregon University
Susan Walsh, provost
_X_ Approved
__Opposed
__Abstained

Western Oregon University
Rob Winningham, provost
_X_ Approved
__Opposed
__Abstained

HIGHER EDUCATION COORDINATING COMMISSION
255 Capitol Street NE, Salem, OR 97310
www.oregon.gov/HigherEd

Docket Item:

University Program Approval: Oregon State University, Bachelor of Music in Music Studies.

Summary:

Oregon State University proposes a new degree program leading to a Bachelor of Music in Music Studies. The statewide Provosts' Council has unanimously recommended approval. Higher Education Coordinating Commission (HECC) staff completed a review of the proposed program. After analysis, HECC staff recommends approval of the program as proposed.

Materials:

Academic program information.

Staff Recommendation:

Staff recommends the Commission move to approve the University Program Approval: Oregon State University, Bachelor of Music in Music Studies.

HECC Docket Submission

Oregon State University seeks the Oregon Higher Education Coordinating Commission approval to offer an instructional program leading to a Bachelor of Music (BMus) in Music Studies.

Program Description and Justification

1. Oregon State University is proposing to offer a new Bachelor of Music degree program in Music Studies beginning summer 2020. The program will be located in the College of Liberal Arts, School of Arts and Communication. The proposed program will be delivered face-to-face on the OSU-Corvallis campus.

2. Describe the purpose and relationship of the proposed program to the institution's mission and strategic plan.

   Oregon State University's Mission is to promote economic, social, cultural and environmental progress for the people of Oregon, the nation and the world. Any focus on promoting social and cultural progress must include an attention to the arts that celebrates human expression. By teaching music to all populations and by encouraging the transmission of culture through the performance and creation of musical works of art that acknowledge the tradition of western music and search to incorporate the diverse richness of a variety of musical cultures and expressions, the Bachelor of Music degree will prepare graduates to engage in a 21st century arts economy. Graduates will contribute to the state of Oregon's future as a creative place to live, work, and succeed.

3. What evidence of need does the institution have for the program?

   The degree is designed to envision where the music industry will grow during the next decade and prepare students for a career in the arts in the 21st century. The Bachelor of Music degree with an option in Performance is the current music industry standard. Additionally, Oregon's arts economy increased by 6.5 percent according to a 2019 report by U.S. News and World Report. Oregon's arts economy outperformed the national average growth rate of 5.9 percent. Oregon was the 11th fastest growing arts economy in the United States.

4. Are there similar programs in the state? If so, how does the proposed program supplement, complement, or collaborate with those programs?

   Portland State University, Southern Oregon University, and the University of Oregon all have Bachelor of Music programs. The University of Oregon's Dean of Music is supportive of the Bachelor of Music degree at Oregon State University and foresees future opportunities to work as allies and collaborators. The field of music performance is broad and popular and therefore able to support multiple Bachelor of Music programs in the state.

All appropriate University committees and the Statewide Provosts Council have approved the proposed program. The Oregon State University Board of Trustees approved the program on October 17, 2019.

Recommendation to the Commission

The Statewide Provosts Council recommends that the Oregon Higher Education Coordinating Commission authorize Oregon State University to establish an instructional program leading to a Bachelor of Music (BMus) in Music Studies effective summer 2020.

Revised May 2016

Proposal for a New Academic Program

Institution:
Oregon State University
College/School:
College of Liberal Arts; School of Arts and Communication
Department/Program Name:
Music Program
Degree and Program Title:
Bachelor of Music (BM): Music Studies

1.0 PROGRAM DESCRIPTION

1a. Proposed Classification of Instructional Programs (CIP) number:

CIP Number: 50.0903
Title: Music Performance, General.

Definition: A program that generally prepares individuals to master musical instruments and performing art as solo and/or ensemble performers. Includes instruction on one or more specific instruments from various instrumental groupings.

Source: **US Department of Education, National Center for Education Statistics, Classification of Instructional Programs, 2010**

1b. Brief overview of the proposed program, including its disciplinary foundations and connections; program objectives; programmatic focus; degree, certificate, minor, and concentrations offered.

The Bachelor of Music will comprise a core of 41 hours together with requirements associated with six options: Instrumental Performance, Piano Performance, Piano Performance and Pedagogy, Vocal Performance, Pedagogy and Literature, and Music Education. Each option will prepare students for professional careers as performers and teachers.

The preparation of music teachers for service in K-12 classrooms has long been a signature focus of Oregon State's Music Program. The proposed Bachelor in Music with the Music Education Option will lead to undergraduate K-12 licensure in four years. Currently, Oregon State only provides for music education licensure through the Master of Arts in Teaching (MAT) degree program. While some music educators certainly benefit from graduate level training, a MAT is not required for entry level positions in the music education field.

The proposed program will be reviewed for accreditation by the Council for the Accreditation of Educator Preparation (CAEP) and go through an approval process by the Oregon Teacher Standards and Practices Commission (TSPC). The new program will also be proposed for accreditation by the National Association for Schools of Music (NASM), a benchmark the curriculum has not previously held.

The current BA/BS in Music will continue to be offered, but only with an option in Music Production. The BA/BS in Music will meet the needs of students interested in general studies in the musical arts and who do not intend to pursue careers in professional music performance and/or education. The BA/BS will also be of interest for OSU students seeking a non-music degree but who are talented musicians and who would value completing two majors.

The Music Program will also continue to offer the Minor in Music and the Minor in Music Performance.

1c. Course of study – proposed curriculum, including course numbers, titles, and credit hours

Current music degree offerings:

- BS or BA in Music with options in the following:
  - Instrumental Performance
  - Music Education
  - Music Production
  - Piano Performance
  - Vocal Performance

Bachelor of Music (BM) in Music Studies, with options in the following:

- Instrumental Performance (120 hours) - New (course list and 4 year plan below)
- Music Education (120 hours) - New (course list and 4 year plan below)
- Piano Performance (120 hours) - New (course list and 4 year plan below)
- Piano Performance and Pedagogy (120 hours) - New (course list and 4 year plan below)
- Vocal Performance, Pedagogy, and Literature (120 hours) – New (course list and 4 year plan below)

For the new tracks, the new degree program will represent an increase of music hours from 83 to 87 to 120. These additional hours will be used to eliminate hidden requirements, which are substantial in ensembles, class piano, and studio instruction, as well as strengthen the program by addressing 21st century needs in multicultural music, music technology, and arts entrepreneurship. These changes will produce stronger graduates, with additional professional preparation, who will graduate in fewer years, and have the industry standard degree.

1d. Manner in which the program will be delivered, including program location (if offered outside of the main campus), course scheduling, and the use of technology (for both on-campus and off-campus delivery).

The BM in Music will be offered at the Oregon State University home campus in Corvallis. It is not anticipated that any parts of this degree program will be delivered via the E-campus system, except for possible hybrid courses that use the distance learning resources for the curricular advantage of the student, but not for the purpose of reaching students beyond the Corvallis campus.

1e. Anticipated Start Date

Fall Term, 2020

2.0 RELATIONSHIP TO MISSION AND GOALS

2a. Manner in which the proposed program supports the institution's mission, signature areas of focus, and strategic priorities.

The mission of Oregon State University, is as follows,

> *As a land-grant institution committed to teaching, research, and outreach and engagement, Oregon State University promotes economic, social, cultural, and environmental progress for the people of Oregon, the nation, and the world.*

Our goal is to achieve this goal through the discipline of music. Our program has traditionally excelled as a land-grant focused unit, with special attention to outreach, especially K-12 music education programs, but also to residents of the Willamette Valley through exemplary performances of music. In recent years, we have seen our attention to research blossom through several tenure-track music education positions. The new program strengthens our ability to carry out this mission, using the arts as our discipline.

The proposal also strongly supports the four goals listed in OSU's Strategic Plan 4.0, especially using the arts in transformative education, preparing graduates to work in a diverse society as global citizens and an emphasis on experiential learning opportunities, which are foundational to study in the arts. The proposal also seeks to build on the regional reputation of our music programs, particularly the ensemble experiences and preparation in the fields of music education and performance, which build engaged alumni, often teaching and performing in communities throughout the Northwest. Finally, the belief that the arts are foundational to a culture of belonging is central to this proposal that seeks to prepare graduates who have precisely the skills to develop this culture through music education and performance in the communities they live and work.

2b. Manner in which the proposed program contributes to institutional and statewide goals for student access and diversity, quality learning, research, knowledge creation and innovation, and economic and cultural support of Oregon and its communities.

Strong arts programs require a diversity of students, a diversity in modes of learning and inquiry, and diversity of expression. Access for students to quality arts programs are key in developing a complete university, and a leading land grant university. Creative and scholarly activity in the arts are dependent on dynamic undergraduate programs where students are engaged in understanding their own modes of expression, both as individuals and in collaboration with other artists. Furthermore, such programs are necessary for faculty to pursue discipline-leading activity in research on teaching, creation of works, and innovative performances. Such an environment, dependent on a talented and motivated undergraduate population, will lead not only to innovation, but also to a population of graduates prepared to engage in a 21st century arts economy, as well as contributing to Oregon's future as a creative place to live, work, and succeed.

All BM and BA/BS student in music will take a required course focusing on non-Western styles of music. MUS 108: Music Cultures of the World includes a survey of musical styles and contexts, including music from Oceania, Indonesia, Africa, Asia, and Latin America. Currently, we teach two different sections of MUS 108, a section that focuses on Native American Flute, and another section that teaches a survey of non-western musical styles and traditions. This class is currently offered only online, but future offerings will be available on campus as well. The latter section (survey), which conforms to the catalog listing, is the course that music majors will be required to take for graduation.

2c. Manner in which the program meets regional or statewide needs and enhances the state's capacity to:

a) improve educational attainment in the region and state;

Provide a practical program that prepares students for careers in a 21st century creative economy in music. First and foremost, the proposed degree program seeks to accomplish this by building on an outstanding regional music education program. The new program will provide undergraduate licensure for music education students. Oregon State University seeks to be the leading producer of music education students in the Northwest. This new program is essential to fulfill this role and this goal.

b) respond effectively to social, economic, and environmental challenges and opportunities; and

In particular, this new degree program seeks to prepare students to be dynamically and uniquely prepared to exist in a 21st century arts economy that requires not only excellent music skills, but also an understanding of communication, technology, pedagogy, and entrepreneurial skills. The newly designed program will include opportunities to develop business skills, public relations, pedagogy, music technology, understanding of diverse culture and music, and a focus on how music teaching, performance, and creation can transform social movements.

c) address civic and cultural demands of citizenship.

Having a population that understands how the arts inform, teach, and enhance our lives is key to successful communities. These graduates will teach, perform, and create in our Oregon communities, contributing to our civic life and providing the necessary talent for our civic and educational organizations to thrive.

3.0 ACCREDITATION

3a. Accrediting body or professional society that has established standards in the area in which the program lies, if applicable.

The appropriate professional accreditation society for institutions awarding degrees in music is the National Association of Schools of Music (NASM). NASM is an association of approximately 647 schools of music, primarily at the collegiate level, but also including postsecondary non-degree-granting schools of music. The association formed in 1924 and launched the accreditation service in 1929. The organization is recognized by the Council for Higher Education Accreditation and in addition to accreditation, produces statistical research, provides professional development for leaders of music schools, and engages in policy analysis.

Additionally, our music education programs are recognized by the Teacher Standards and Practices Commission (TSPC) of the State of Oregon, and the Council for the Accreditation of Educator Preparation (CAEP) through the College of Education.

4.0 ENROLLMENTS

4a. Anticipated fall term headcount and FTE enrollment over each of the next five years

Fall Head-Count	AY 2020	AY 2021	AY 2022	AY 2023	AY 2024
BM	110	130	155	185	200
BA/BS	80	75	65	50	50

Total	190	205	220	235	250

Because the new program is a conversion of the BA/BS programs in Music Education and Performance into the Bachelor of Music, and because this proposal includes a redesign of the BA/BS in general music studies, the above charts include estimated Fall headcounts and Fall FTE for both the BM and the BA and BS.

Students who are in their first year of their degree program will convert from the BA/BS to the BM, if their option is music education or performance. There are several reasons for expected the growth. First, the BM with an option in Performance is the industry standard and this will attract students who might have attended in the past, but chose other schools based on available curriculum. Secondly, the BM with an option in Music education will provide undergraduate licensure, whereas in the past, Oregon State University did not offer this choice. Finally, these numbers also include expected growth in the BA/BS in music production. These numbers do not include possible growth from students in the Popular Music minor and a new online program in music industry currently under construction.

4b. Expected degrees/certificates produced over the next five years

Expected Degrees	AY 2020	AY 2021	AY 2023	AY 2024	AY 2025
BM	0	0	15	20	30
BA/BS	25	25	12	15	15
Total	25	25	27	35	45

4c. Characteristics of students to be served (resident/nonresident/international; traditional/nontraditional; full-time/part-time; etc.)

The characteristics of students served in the past have tended to be resident, full-time, traditional students. Currently, 92% of our students are resident, with 8% non-resident. 73% of our students are fulltime and 27% are either half or less. 51% are female and 49% are male, 62% are white, and 38% are other or are unknown. 91% of students are under 25 years of age, while 9% are 25 years old or older. There are currently no students in the program who are veterans.

We also expect to see a greater number of transfer students as more student begin their study at Oregon community colleges. We currently have close relationships with Chemeketa Community College and Linn-Benton Community College and are having transfer students join the program each year.

Finally, increasing diversity among the student population has been a stated goal of the music faculty. Particularly in music education, it is expected that recruiting of diverse populations will be a priority.

4d. Evidence of Market Demand

Students with completed undergraduate degrees in both performance and music education have gone on to significant careers as composers, teachers, and performers, either straight in the profession, or by successfully gaining application to graduate programs. Additionally, OSU is a regional leader in the preparation of music educators, drawing significant numbers both as undergraduates and graduate

students. It is expected that the new program will increase the numbers of undergraduate music education students.

While cuts to music education often receive great media attention, a 2009 Gullup survey revealed that society highly values including music education as part of a complete education and that the numbers of students participating in music education continues to increase for past decades (https://www.namm.org/news/press-releases/new-gallup-survey-namm-reflects-majority-americans). Such results suggest that support for music education as a part of the American education system remain strong and need for teachers will continue in the future.

Our own state has had to rely on out of state music education graduates to fill crucial positions. The Salem-Keizer district, one of the most significant employers of music educators has hired 51 of their 105 educators with degrees from institutions outside of Oregon. This is the 2nd largest education district in the state with 105 music specialists in 67 schools and the district office. This spring (2019), they are advertising 13 open positions and OSU graduates are being considered. Currently, about 20 percent of their music education specialists have degrees from Oregon State. Statewide, there are more than 950 certified and non-certified music specialists working in music education based on 2015-2016 data (OSMAP census data).

While the number of performance majors has not been large, we have had significant numbers of graduate students go on in the field of piano, vocal, and instrumental music, becoming important performers and teachers. With the new focus on pedagogical skills, we expect to see greater numbers see a performance degree as a route toward a teaching and performance career.

In terms of the greater picture for the need for students with skills in the arts, a 2019 study (https://www.arts.gov/news/2019/latest-data-shows-increase-us-economy-arts-and-cultural-sector) by the US Bureau of Economic Analysis and the National Endowment for the Arts found that the arts contribute $763.6 billion to the US economy—4.2 percent of the GDP—more than agriculture, transportation, or warehousing. The data, which comes from 2015, shows that 4.9 million people work in the arts economy, earning more than $370 billion. This data represents an expanding arts economy over past decades. Furthermore, Oregon's arts economy increased by 6.5 percent, outperforming the national average growth rate of 5.9 percent. Oregon was the 11th fastest growing arts economy in the United States.

4e. Estimate the prospects for success of program graduates (employment or graduate school) and consideration of licensure, if appropriate. What are the expected career paths for students in this program?

Evidence of past success is the best predictor of future success. Graduates of OSU music have gone on to successful careers as teachers, performers, composers, and creators, and other graduates have made important contributions to other professions outside of music. In music education, OSU has had a 100 percent placement rate for those students actively searching for a position, and our state includes a tremendous number of OSU graduates Furthermore, graduates in the area of performance have gone on to an impressive list of graduate schools and have had significant careers as performers and teachers.

5.0 OUTCOMES AND QUALITY ASSESSMENT

5a. Expected learning outcomes of the program.

Content Competencies: All music students will demonstrate skills in music theory (written and aural), keyboard skills, musicology, and conducting at a level of competency sufficient for success in their chosen emphasis.

- Music Theory: Written and Aural
- Keyboard Lab
- Introduction to Conducting
- Music History/World Music

Pedagogy: All music students will develop pedagogical practices preparing them to demonstrate strategies for effective teaching and facilitating student learning, either as a classroom teacher, a studio instructor or a community arts leader.

- Studio instruction;
- Ensemble experiences;
- Leadership through ensemble experiences;
- Pedagogical courses;
- Core courses in theory, ear training, piano, and music history; and
- Practical teaching experience under the supervision of a master-teacher.

Performance: All music students will be able to demonstrate performance skills and an understanding of appropriate performance practices for varied styles, and an application of those competencies in live performance.

- Studio instruction;
- Ensemble experiences, both traditional and emerging;
- Core courses in theory, ear training, and music history; and
- Recitals, and other performance experiences with ensembles and chamber music.

Creativity/Creation: All music students will be able to musically create through composition, music technology, online and virtual content, and scholarship/research.

- Core courses in music theory, composition, arranging;
- Group piano classes;
- Music production and technology courses; and
- Music education curriculum, music history, writing about the profession of music, assessment, pedagogy and research courses.

Engagement: All music students will describe the values of music and music education in society to engage communities in music making in support of the arts.

- Music History
- Music Education courses
- Writing about Music
- Arts Entrepreneurship

6.0 INTEGRATION AND COLLABORATION

6a. Closely related programs in other HECC universities and Oregon private institutions.

The following public Oregon institutions currently offer a Bachelor of Music:

- University of Oregon, with options in composition, music education, jazz studies, and performance;
- Portland State University, with options in performance, music education, composition, and jazz studies; and
- Western Oregon University, with an options in contemporary music.

6b. Ways in which the program complements other similar programs in other Oregon institutions and other related programs at this institution. Proposal should identify the potential for collaboration

Opportunity for collaboration exists with Portland State University and the University of Oregon in sharing resources to include visiting performers and artists for performances, masterclasses, and scholar residencies. Opportunity also exists for significant collaboration with other Oregon State programs, including Art, Theater, New Media Communication, College of Education and other areas that share a focus on teaching and artistic creation.

Additional information: available in a separate document upon request

Institution: Oregon State University
Program: Bachelor of Music

Action: At the **November 21, 2019** meeting, the Statewide Provosts Council approved a new program for **Oregon State University, Bachelor of Music,** Policy to move forward to the Oregon Higher Education Coordinating Commission for its review and approval. The **Oregon State University** Board of Trustees approved the program at its **October 17, 2019** meeting.

Eastern Oregon University
Sarah Witte, provost
_X_ Approved
__Opposed
__Abstained

Oregon State University
Ed Feser, provost
_X_ Approved
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Patrick Phillips, provost
_X_ Approved
__Opposed
__Abstained

Oregon Health & Science University
Elena Andresen, interim provost
_X_ Approved
__Opposed
__Abstained

Oregon Tech
Joanna Mott, provost
_X_ Approved
__Opposed
__Abstained

Southern Oregon University
Susan Walsh, provost
_X_ Approved
__Opposed
__Abstained

Western Oregon University
Rob Winningham, provost
_X_ Approved
__Opposed
__Abstained

HIGHER EDUCATION COORDINATING COMMISSION
255 Capitol Street NE, Salem, OR 97310
www.oregon.gov/HigherEd

Docket Item:

University Program Approval: Oregon State University, Bachelor of Science (B.S.) in Biological Data Science.

Summary:

Oregon State University proposes a new degree program leading to a B.S. in Biological Data Science. The statewide Provosts' Council has unanimously recommended approval. Higher Education Coordinating Commission (HECC) staff completed a review of the proposed program. After analysis, HECC staff recommends approval of the program as proposed.

Materials:

Academic program information.

Staff Recommendation:

Staff recommends the Commission move to approve the University Program Approval: Oregon State University, Bachelor of Science (B.S.) in Biological Data Science.

HECC Docket Submission

Oregon State University seeks the Oregon Higher Education Coordinating Commission approval to offer an instructional program leading to a Bachelor of Science in Biological Data Sciences.

Program Description and Justification

1. *Identify the institution, degree, and title of the program.*

   Oregon State University is proposing to offer a new Bachelor of Science degree program in Biological Data Sciences beginning in summer 2020.The program will be located in the College of Agricultural Sciences. The proposed program will be delivered face-to-face on the OSU-Corvallis campus.

2. *Describe the purpose and relationship of the proposed program to the institution's mission and strategic plan.*

   The Biological Data Sciences program is structured to help meet the state of Oregon's 40-40-20 goal, specifically that 40% of Oregonians will complete a four-year degree. The Biological Data Sciences program does this by diversifying OSU's portfolio of academic programs into an area where there is substantial job growth. The program will include early academic advising, research opportunities and peer-to-peer learning to promote student success and retention. Access to research opportunities on the undergraduate level has been shown to increase retention and provide greater access to graduate school for under-represented students. The transdisciplinary curriculum of Biological Data Sciences is expected to attract a student population with diverse academic backgrounds, interests, and career goals. The structure of the program ensures distributed learning and an interdependent learning community designed to help reduce achievement gaps between diverse groups of students and first-generation college students.

   Graduates of the Biological Data Sciences program will be prepared to engage in work that addresses timely issues such human health, food security, global climate change and social progress that directly reflect OSU's signature areas of focus and strategic priorities.

3. *What evidence of need does the institution have for the program?*

   A 2014 industry association report from the Coalition of State Bioscience Institutes stated that workers with degrees in subject areas that prepare them for data analytics are in exceptional demand.

   Past analyses and present-day assessment indicate that demand for scientists qualified to analyze big data outstrips supply. Oregon's STEM Investment Council has set as one of their goals to double the number of students who earn a postsecondary degree with proficiencies in the STEM field. Biological Data Scientists fill an existing void state-wide and nationally.

4. *Are there similar programs in the state? If so, how does the proposed program supplement, complement, or collaborate with those programs?*

   To our knowledge, there are currently no post-secondary institutions in Oregon that offer an undergraduate degree in Biological Data Sciences.

All appropriate University committees and the Statewide Provosts Council have approved the proposed program. The Oregon State University Board of Trustees approved the program on October 17, 2019.

Recommendation to the Commission

The Statewide Provosts Council recommends that the Oregon Higher Education Coordinating Commission authorize Oregon State University to establish an instructional program leading to a Bachelor of Science in Biological Data Sciences, effective summer 2020**.**

Proposal for a New Academic Program

Institution: Oregon State University
College/School: College of Agricultural Sciences
Department/Program Name: Botany and Plant Pathology
Degree and Program Title: Biological Data Sciences (BDS)

1. PROGRAM DESCRIPTION

a. Proposed Classification of Instructional Programs (CIP) number.

CIP Code 26.1199
Title: Biomathematics, Bioinformatics, and Computational Biology, Other.
Definition: Any instructional program in biomathematics, bioinformatics, and computational biology not listed above.

b. Brief overview (1-2 paragraphs) of the proposed program, including its disciplinary foundations and connections; program objectives; programmatic focus; degree, certificate, minor, and concentrations offered.

We propose a new undergraduate major and minor that combines education and practical training in biological data sciences (**BDS**), a new paradigm in the life sciences that couples large-scale data collection with advanced computational and analytical methods for data analyses. Data are currently being collected at speeds and scales that were previously unimaginable and modern research programs addressing issues of human health, energy, the environment, and food security are heavily dependent on scientists with the skills to work large and complex datasets. The training of undergraduate students in the life sciences, however, has not been contemporized to meet these needs. The BDS undergraduate program outlined here addresses that deficit by providing transdisciplinary education that intersects the life sciences, computer science, statistics, and mathematics. The BDS academic program is designed to make use of existing course curricula in life and earth sciences, chemistry, mathematics, computer science, and statistics to provide a core knowledge base for all BDS students. Each student also chooses an academic program of particular interest to pursue an in-depth option that is part of the 180 credits required for their degree. This breadth of academic training is one special feature of the BDS degree. The other unique feature is the series of BDS cohort classes that emphasize the following: 1) active learning, application, and integration of the core knowledge base, 2) working in teams, and 3) communicating across disciplines. These learning experiences will foster undergraduate engagement and provide skills that are needed for success in graduate or professional school and the workplace.

BDS will be based in the College of Agricultural Sciences (CAS) and administered by Department of Botany and Plant Pathology (BPP), but the program is designed to be collaborative and to integrate courses and faculty across units representing multiple disciplines, including all of the life sciences departments, Chemistry, the School of Life Sciences, School of Electrical Engineering and Computer Science, the departments of Statistics and Mathematics, and the College of Earth, Ocean, and Atmospheric Sciences.

<u>The outcome of the BDS program will be graduates that</u>:

1. are trained in core knowledge and competencies across the *diversity* of disciplines;
2. have domain expertise in an area of one disciplinary field;
3. understand the process of scientific investigation;

4. understand the appropriate use of a variety of quantitative methods;
5. communicate effectively across disciplines; and
6. function collaboratively in transdisciplinary teams.

c. **Course of study**

General features of the program:

1. Students will learn the fundamentals of the life sciences, computer science, mathematics, and statistics.
2. Students choose an option to study a particular area of BDS at a deeper and more rigorous level.
3. The foundational and advanced classes are drawn from existing OSU academic programs in various colleges and departments.
4. Five new BDS courses are designed to educate the students as a cohort to integrate the various disciplinary approaches, and to use case studies, and capstone projects to learn skills necessary for functioning in teams.
5. Each student completes an independent experiential learning activity and learns to capture that experience in professional writing and oral presentation skills.

Core concepts and competencies that define the BDS degree:

1. Fundamentals of the life sciences: ecology/evolution, structure/function, information flow, energy and matter transformation, and systems.
2. Fundamentals of statistics: statistical inference, probability distributions, and commonly used statistical models.
3. Fundamentals of mathematics: derivatives and integrals and their applications; basic notions in linear algebra including matrix manipulations, eigenvalues and eigenvectors and their applications.
4. Fundamentals of computer science: programming skills, data structures, design and analysis of algorithms, and data mining.
5. Effective communication with researchers within and across disciplines; functioning effectively in teams to accomplish a common goal.
6. Appropriate and sensible use of quantitative methods and tools to effectively manage, summarize, visualize, manipulate, and make accurate inference from large biological datasets.
7. Process of scientific investigation: hypothesis generation, experimental design, and data generation, data analysis and evaluation.
8. Knowledge of principles in the life sciences to generate biological datasets.
9. Knowledge of theories and principles in the life sciences to develop testable hypotheses.
10. How to apply methods of mathematics to model biological systems.
11. Knowledge of principles in statistics, mathematics, and computer science to use and adapt quantitative-based methods for research needs.
12. Knowledge of theories and principles in statistics, mathematics, and computer science to design computer-based systems and new approaches for research needs.

d. Anticipated start date.

Fall, 2020

2. Relationship to Mission and Goals

a. Manner in which the proposed program supports the institution's mission, signature areas of focus, and strategic priorities.

OSU has set goals to raise the standards in teaching, research, and outreach to meet the mission of promoting economic, social, cultural, and environmental progress in the three signature areas of sustaining Earth ecosystems, improving human health, and promoting economic growth. Solutions to many of the most complex problems relevant to these signature areas require the integration of large and

diverse data sets and the linked development of computational models encompassing multiple levels of scale.

The proposed BDS program is designed to address the mission of OSU. The rigorous program will recruit the top domestic and international students. As part of the learning experience, students will be required to participate in an experiential learning activity and a senior capstone course. At OSU, there are many research programs across the life science departments that generate and use big data to address timely issues in human health, food security, global climate change, and social progress. In mathematics, statistics, and computer science, research programs are innovating approaches for processing, analyzing, and modeling large datasets. These research programs offer multiple opportunities for students to learn to use large and real-world datasets to address societal issues relevant to OSU's three signature areas.

To provide students a transformative educational experience, BDS is structured for cohort learning and promotes the integration of domain knowledge from multiple disciplines and teaches skills necessary for effectiveness in teams. The learned skills will prepare students for careers in research and development in academic, private, and government sectors, which are increasingly seeking graduates who are capable of adapting to and bridging multiple disciplines, and who are comfortable with diverse quantitative and computational methods necessary for success in trans-disciplinary collaborations.

b. Manner in which the proposed program contributes to institutional and statewide goals for student access and diversity, quality learning, research, knowledge creation and innovation, and economic and cultural support of Oregon and its communities.

The proposed BDS program values the importance of diversity in enriching the research, teaching and outreach missions of OSU. Because of the trans-disciplinary nature of the BDS major, we will attract a student population with very diverse academic backgrounds, interests, and career goals. To promote inclusivity and retention, students in the BDS program will be constantly engaged in tasks and projects that require work in small trans-disciplinary teams. The program will also be structured to have moderate to high levels of active learning exercises in its courses and a cohort that meets annually in BDS core courses. This structure ensures quality, a distributed learning, and an interdependent learning community, all of which help reduce achievement gaps between diverse groups of students and first-generation college students (5).

BDS requires its students to work with data generated by researchers who engage in collaborative research and participate in activities to generate knowledge, innovate approaches, and contribute to discoveries that have the potential to benefit Oregon and its communities. BDS will be administered by a department that has a strong culture of high-quality, interdisciplinary, collaborative research and teaching. The coupling of the two missions provides students direct access to research opportunities, many of which directly address the signature areas of sustainable Earth ecosystems and food security/human health. Moreover, because BDS uses foundational courses offered by other units and has core courses taught by faculty outside of BPP, students will have direct access to the various research programs across OSU. Last, BDS will have the synergistic effect of furthering the integration of researchers at OSU and innovating the research missions of OSU.

c. Manner in which the program meets regional or statewide needs and enhances the state's capacity to:

i. improve educational attainment in the region and state;

By implementing the 40-40-20 education goal, the state of Oregon has raised the standards for educational attainment. To help meet the goals of 40% Oregonians completing a 4-year degree, the BDS program will include early academic advising, strong learning experiences, and peer-to-peer learning to promote student success. BDS will also emphasize early academic achievement and ensure students have strong skills in writing and math. The cohort learning establishes a distributed learning environment, contributes to cultural awareness, all of which have been shown to benefit historically under-served students (6). Most importantly, research experience and skills, like those provided by the BDS capstone

project and courses, are becoming increasingly necessary for successful post-undergraduate career plans. Students are also more likely to stay in a STEM field and express interest in an advance degree if given opportunities to conduct independent undergraduate research (7). This retention seems to be particularly evident in historically under-represented students (8-10). The research experiences make faculty and staff more approachable, another factor that positively influence student success. In addition, the director of BDS will be involved in teaching and developing program portfolios and will be approachable to students. Last, students have greater successes in courses that incorporate active learning (4). Improved grades and increased rate of completion of STEM courses can reduce course repetition, the time for degree attainment and the cost of college for the students while leading to a higher graduation rate. Thus, by integrating active learning throughout the BDS program we are maximizing the likelihood that students who start the degree will successfully complete the program.

ii. respond effectively to social, economic, and environmental challenges and opportunities; and

Finding solutions for some of the most pressing societal challenges requires a "new biology for the 21st century" that is dependent on integration within biology and collaboration with other sciences (11). Innovative technologies and the scale in which data can be collected are transforming key sectors such as agriculture, research on climate change, and the health industry, especially in the area of personalized medicine. For example, employment in Oregon bioscience-based industries grew by nearly 31% in 2001-2010 and personalized medicine is expected drive 27% growth of biomedical engineering employment in Oregon in the next decade. BDS is designed to address the need to prepare students for skills in working large datasets and collaborating across disciplines and will thus supply skilled professionals who can help the state respond effectively to challenges and opportunities.

iii. address civic and cultural demands of citizenship.

Cohort learning promotes the sharing of experiences and interactions and group commitment to achieving a common educational goal. Evidence has suggested that such learning models improve academic achievements. Importantly, cohort learning gives students opportunities to practice cooperation, in contrast to competition, and provides more support for students as they progress towards their goals. Members of cohorts are exposed to more diverse ideas and perspectives, which contribute to a greater sense of inclusivity and better cultural awareness. This learned sense of cooperation will translate to informed professionals who are more aware of the responsibilities of citizenship.

3. Enrollments

a. Anticipated fall term headcount and FTE enrollment over each of the next five years.

The following projections assume students will graduate in four years and increased enrollment as the program matures.

Year 1: 15~25 Year 2: 35~50 Year 3: ~75 Year 4: 100~115 Year 5: ~125

b. Expected degrees/certificates produced over the next five years.

Year 1: 0 Year 2: 0 Year 3: 5 (we expect transfer students) Year 4: 20-30 Year 5: 20-30

c. Characteristics of students to be served (resident/nonresident/international; traditional/ nontraditional; full-time/part-time, etc.).

Students pursing the BDS major will be resident, nonresident, and international full-time traditional students. Bioinformatics is a highly sought-after skill and the BDS major is expected to attract a more diverse demographic of students, including non-resident and international students.

d. Evidence of market demand.

As expected of an explosion of data richness, there has been a corresponding increase in demand for trans-disciplinary trained scientists, and a variety of career opportunities. Analysis of employment advertisements from 2003-2008, revealed a substantial and steady increase in opportunities (12). In fact, past analyses and present-day assessment indicate that demand for qualified scientists outstrips supply (13,14). It has been estimated that the United States faces a shortage of individuals with analytical skills necessary for analyzing big data (15). An analysis of current and future computer science needs showed that the largest need for faculty is in the area of "big data" (16). Locally, more than 20% of the jobs in Oregon fall into the STEM (Science, Technology, Engineering, and Math) categories (17). Based on projected job openings, 82% require a doctoral or professional degree while 55% require a bachelor's degree. The STEM fields are recognized as being key to economic well-being. Yet, there is concern that demand outstrips supply and the Oregon's STEM Investment Council has set as one of their goals to double the number of students who earn a postsecondary degree with proficiencies in a STEM field.

4. Outcomes and Quality Assessment

a. Expected learning outcomes of the program.

The learning outcomes of BDS are:

1. Apply the process of scientific investigation to real world biological datasets.
2. Use appropriate quantitative and visual methods in scientific investigation.
3. Demonstrate proficiency in using appropriate methods to organize and manipulate large datasets.
4. Demonstrate effective communication and functioning in trans-disciplinary teams.
5. Adhere to the standards of ethical behavior (honesty and integrity in all stages of scientific practice to produce unbiased scientific knowledge).
6. Apply the core concepts in the biological sciences, mathematics, statistics, and computer science to scientific investigation.

5. Program Integration and Collaboration

a. Closely related programs at other Oregon colleges and universities.

There are no closely related programs, as no Oregon public university offers an undergraduate Bachelor of Science degree in Bioinformatics and Data Science. However, University of Oregon has a Bioinformatics and Genomics Master's Program. Portland State University and Oregon Health & Sciences University have a Biomedical Informatics Program, which combines a computer science degree and a Master's degree in Biomedical Informatics. At OSU, several undergraduate programs offer options that are related to BDS. For example, EECS offers a bioinformatics option. Mathematics offers a Mathematical Biology option. Biochemistry and Biophysics offers a Computational and Molecular Biology option. BioResource Research has a Genomics/Bioinformatics option. However, BDS will be a degree-granting program and is unique in being a transdisciplinary program that requires students to have disciplinary foundations in biology, mathematics, computer science, and statistics. Last, BDS provides a cohort learning experience that ensures integration of knowledge and skills across the disciplines.

Proposal References Available in a separate document upon request

Institution: Oregon State University
Program: BS in Biological Data Sciences

Action: At the **November 21, 2019** meeting, the Statewide Provosts Council approved a new program for **Oregon State University, BS in Biological data Sciences,** Policy to move forward to the Oregon Higher Education Coordinating Commission for its review and approval. The **Oregon State University** Board of Trustees approved the program at its **October 17, 2019** meeting.

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Docket Item:

2021 Budget and Policy Development Timeline

Summary:

This report provides information to the Commission regarding two intersecting processes that are set to begin this month: development of legislative concepts for the 2021 legislative session, and development of the agency request budget for the 2021-2023 biennium. For this development cycle, staff are focused on a couple of areas of process improvement from 2019. First, staff are working to better integrate these processes with one another, and to do so as early as possible during the cycle. Second, staff are working to develop a structure that will focus the agencies efforts earlier, narrowing and prioritizing the list of potential concepts and budget items so that more effort can be placed into building out the most important and likeliest final proposals.

Attached is provided a draft timeline for key activities that must take place between now and the finalization of legislative concepts and agency request budget in December 2020.

Legislative Concept Development
On December 10, HECC staff most directly involved in policy planning and development, from offices across the agency, met to discuss some initial process and to develop problem statements that collectively, staff believe are most important to work on in order to improve outcomes for students and advance the state further toward its higher education and workforce development goals. Staff will submit information on proposals responsive to these statements. Soon thereafter, agency leadership will begin analyzing proposals and making determinations about which proposals the agency should devote time and resources to further exploring.

During the course of concept development, the Commission will receive periodic updates regarding concepts and the general direction of policy proposals, such that the Commission will be able to approve concepts as required before the end of 2020.

Agency Request Budget Development
HECC staff is in the process of planning for the 2021-23 budget development process. While the Agency Request Budget is not due until August 2020, we must begin to engage with staff and stakeholders now to identify proposed Policy Option Packages.

Staff will complete most Agency Request Budget development work as set out by Commission policy and as outlined in the Strategic Plan. At key junctures in the process, most likely occurring in spring and summer of 2020, staff will request feedback and input from the Commission. We will request adoption of an Agency Request Budget by the Commission at the August, 2020 meeting.

The budget development and adoption process consists of several phases and requires engagement and involvement from every part of the agency. The phases of the upcoming biennial budget development process and the contributions of the various parties are described in more detail in the attached Agency Request Budget Development Schedule.

Material:

Legislative Concept and Agency Requested Budget Development Timeline

Staff Recommendation:

This is an informational and discussion item only.

HIGHER EDUCATION COORDINATING COMMISSION
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Higher Education Coordinating Commission
2021-23 Agency Request Budget/Legislative Concept Development Schedule

December 2019	Meet with Policy leads to kick off planning for LC/POP development	December 10, 2019
	Present calendar and LC/POP Development Plan to HECC Commission	December 12, 2019
January 2020	Vet Initial List of LCs/POPs with Executive Team	January 21, 2020
Feb/March 2020	Present Concepts to various HECC boards and stakeholders (for input	February- March
	Complete HECC POP Request Forms	By end of March
April 2020	Provide overview and receive input from HECC Commission	April 9, 2020
	Submit Legislative Concepts to DAS (including placeholder concepts)	April 17, 2020
May 2020	Finalize Policy Packages	May 10, 2020
	Submit Article XI-Q Bond and Lottery Revenue Bond Financing Request Form	May 15, 2020
June 2020	Staff Approval of Final Policy Packages	Early June, 2020
	Approve Reduction Options	Mid June, 2020
	Program Prioritization	Mid June, 2020
August 2020	Present POPS/2021-23 Budget to HECC Commission	August 13, 2020
	Budget Document Due Date to DAS	August 31, 2020
November 2020	Approval of Legislative Concepts by the Commission	November 12, 2020
December 2020	LAST DAY to pre-session file bills for 2021 Leg Session.	December 4, 2020

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Docket Item:

Motion to Issue a Final Order Removing Portions of Lake County from the Central Oregon Community College Service District and Annexing it to the Klamath Community College Service District.

Summary:

At the October 2019 Commission meeting, the Commission formally opened the process necessary to consider removing voting precincts 13 and 14 of Lake County, comprising the northernmost area of the County, from the Central Oregon Community College (COCC) Service District, and annex it to the Klamath Community College (KCC) Service District. This motion was made after approximately 18 months of investigation and consideration of the status of this portion of the county involving concerned citizens, the administrations of both involved colleges, school and other county officials in Lake County, and the Oregon Community College Association.

In response to the Commission's motion, HECC staff Kyle Thomas and Patrick Crane held two required public hearings on October 28th on the campus of the Silver Lake School District in Silver Lake, and October 29 on the campus of KCC in Klamath Falls.

In the opinion of staff, the public hearings and the broader investigation and stakeholder engagement process support the transition of the concerned territory from COCC to KCC. Particularly, the process has resulted in several key findings:

- The territory is currently being served by distance learning technology offered by KCC
- Residents present at the hearing believe KCC offers programming that is more aligned with the educational needs of the territory that that offered by COCC
- Lake County has a current contractual relationship with KCC and the Lakeview ESD has a positive relationship with KCC
- COCC does not have current plans to increase or improve educational services provided by COCC to the territory
- The current district boundaries are not aligned with the current contracts, relationships, and interests of the territory or broader Lake County
- The administrations of both COCC and KCC support the transition of the territory
- The COCC Board of Directors has taken formal action to support the transition
- The majority of residents present at the hearings supported the transition of the territory
- The tax liability of residents of the territory will decrease, as the KCC mill rate is currently lower than the COCC mill rate, without any loss in educational services

Therefore, staff recommends the Commission move forward with the process of transitioning the concerned territory from COCC to KCC through the issuance of a final order. In accordance with ORS 341. 565(4), the order requires approval by the Legislative Assembly, in the form of a bill or resolution, prior to taking effect. Staff intends to submit the order in advance of the February 2020 legislative session. If approved, the Order would take effect on June 30, 2020. If the legislature does not take action prior to adjournment of the 2020 session sine die, the Order would not take effect, and future action on this issue would require the Commission to begin the process again.

Material:

Proposed and Final Order.

Staff Recommendation:

Staff recommends the Commission approve the Proposed and Final Order, and direct staff to cause a copy of such Order to be delivered to the Legislative Assembly for approval pursuant to ORS 341.565(4).

HIGHER EDUCATION COORDINATING COMMISSION
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HIGHER EDUCATION COORDINATING COMMISSION
December 12, 2019
Docket Item #: 7.1

PROPOSED AND FINAL ORDER

The Commission, upon motion and after the required public hearings, finds that the proposed changes will have no substantially adverse effect upon the ability of the affected districts to provide and continue their programs and is not made solely for tax advantages to property owners in the districts affected by the proposed changes.

The Commission orders that the territory of the Central Oregon Community College Service District (COCC) defined by voting precincts 13 and 14 of Lake County, generally comprising the northernmost section of the County, is removed from COCC and the same territory is annexed into the Klamath Community College Service District.

Approved by a vote of the Commission on December 12, 2019

_____
David Rives, Chair

_____
Ben Cannon, Executive Director

HOWARD Karen Lynne

From: THOMAS Kyle
Sent: Wednesday, November 20, 2019 10:04 AM
To: Helen Petersen
Cc: HOWARD Karen Lynne; CRANE Patrick; WIGGINS Kaitlyn
Subject: RE: North Lake Comment Period

Good morning Helen,

Thank you for your email. It will be circulated as part of the record for the Commission's deliberation in the N Lake County agenda item.

Best,

Kyle

From: Helen Petersen <petersenhivonne@gmail.com>
Sent: Tuesday, November 19, 2019 5:59 AM
To: THOMAS Kyle <Kyle.Thomas@HECC.OREGON.GOV>
Subject: North Lake Comment Period

11/19/2019 @6am

Dear HECC and Legislation,

My name is Helen Petersen. I am a board member of Klamath Community College. I want to get behind the north lake transfer of tax districts, but I cannot. The petition (which I had to request from the HECC because KCC administration still refuses to make it available to its own board of education) only wanted removal from the COCC taxing district, and not transfer. The north Lake constituents should not be forced to pay taxes to community colleges that refuse to support or give them access to college level education. As Dr. Gutierrez stated on the record, "we promise nothing. We make no promises!" So, north Lake constituents will be transferred to KCC district, who has made it clear they will not receive adequate education. North Lake will also still be paying taxes on a bond for COCC, without representation on the COCC board. This transfer gets into the dangers of taxation with out representation!

I want to also point out that this was never approved by the KCC board of education. Dr. Gutierrez just mentioned the north Lake petition to the board in August. The KCC president stated, "North lake made a petition to join KCC's district.....north lake wants to join KCC like a marriage". This information was false! North lake did not want to join KCC's district and in the petitioner's own words, "we want a divorce!!" This is the main reasoning behind why I cannot support this transfer. This entire agreement is built on the backs of lies! Dr. Gutierrez is lying to his own board, lying to the HECC, and forced the north Lake constituents into his lie. Dr. Gutierrez has made it adamantly clear his only focus is FTE and money, not students, not education, and not the constituents he serves.

Helen Petersen

KCC Board of Education, Zone- At large

251-554-2892

HOWARD Karen Lynne

From:	Roberto Gutierrez <gutierrezr@klamathcc.edu>
Sent:	Thursday, December 5, 2019 9:13 AM
To:	CANNON Ben
Cc:	CRANE Patrick; Dave Jensen
Subject:	KCC resolution concerning North Lake
Attachments:	Memorandum to HECC regarding North Lake email (version 2).docx; ATT00001.htm; IX.B.pdf; ATT00002.htm

Ben I'm sending the attached on behalf of the KCC Board of Education. Feel free to distribute the information as needed and is made part of the permanent record.
For information purposes I've cc'd Chairman Jensen and Patrick Crane.

Sent from my iPhone

Memorandum to the Higher Education Coordinating Commission

To: Ben Cannon, Executive Director of the Oregon Higher Education Coordinating Commission and the Higher Education Coordinating Commission Board Members

From: The Board of Education for Klamath Community College

Date: December 5, 2019

Re: North Lake Transfer from the taxing district of Central Oregon Community College to that of Klamath Community College

---

Mr. Cannon and other Members of the Higher Education Coordinating Commission Board,

In response, and in an effort to correct the record, the KCC Board of Education passed the attached resolution in which the Board rejects the entire email as representing the views of the KCC Board of Education. The email was strictly the opinion of one Board member. The attached resolution is the position of the Board, as a whole. This resolution passed at our Board meeting, dated December 3, 2019 by a vote of 6-1.

Thank you for your time and attention to this very important matter.

PRESENTED TO THE KCC BOARD OF EDUCATION
December 3, 2019

Klamath Community College

SUBJECT/STRATEGIC GOAL:

Resolution Taking Board Action to Rebut Email Sent to the Oregon Higher Education Coordinating Commission

ITEM NO: IX.B.

FROM: Dave Jensen, Board Chair and William Riggs, Board Vice-Chair

ATTACHMENT:

1. Email dated November 19, 2019 from Helen Petersen to Kyle Thomas

REASON: Board Action

Resolution No. 185-19-20

BACKGROUND: On November 19, 2019, Kyle Thomas, the Director of Legislative and Policy Affairs for the Oregon Higher Education Coordinating Commission (HECC), received an email from Ms. Helen Petersen, a member of the Klamath Community College Board of Education. In this email, which was sent as part of the comment period related to the potential North Lake transition from the taxing district of Central Oregon Community College (COCC) to the taxing district of Klamath Community College (KCC), Ms. Petersen made some statements regarding the process of switching North Lake from COCC to KCC and regarding the President of Klamath Community College.

RECOMMENDATION: The Board of Education may, in its discretion, adopt the following resolution no. 185-19-20 as presented, rebutting an email sent to the Oregon Higher Education Coordinating Commission purporting to be an action of the Board of Education, according to the following resolution:

BE IT RESOLVED, that the email, dated November 19, 2019, from KCC Board Trustee Helen Petersen to Kyle Thomas, the Director of Legislative and Policy Affairs for HECC, does not represent the view of the Board of Education for Klamath Community College, and Trustee Petersen does not speak on behalf of the Board as a whole;

AND BE IT FURTHER RESOLVED, that the KCC Board of Education does not agree with Trustee Petersen that the KCC President, Dr. Roberto Gutierrez, has lied or misled the Board in any way;

AND BE IT FURTHER RESOLVED, that the KCC Board of Education believes that Dr. Gutierrez has at all times kept the KCC Board of Education apprised of the North Lake situation in both a timely and truthful manner;

AND BE IT FURTHER RESOLVED, that the KCC Board of Education rejects completely, as inaccurate and false, the inflammatory language set forth in the last three sentences of the email in question.

Board Action: Approved: _____ Rejected: _____ Tabled: _____ Until: _____

Recommendations: _____

Klamath Community College
7390 South Sixth Street
Klamath Falls, OR 97603-7121
Telephone: 541/882-3521
Fax: 541/885-7758

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255 Capitol Street NE, Salem, OR 97310
www.oregon.gov/HigherEd

HIGHER EDUCATION COORDINATING COMMISSION
December 12, 2019
Docket Item #: 9.1

Docket Item:

HECC 2019 Key Performance Measure (KPM) Report

Summary:

All executive branch agencies have key measures of performance (KPMs) that are approved by the Legislature and tracked annually. The Office of Research and Data calculates these measures and submits an Annual Performance Progress Report to the Legislative Fiscal Office and the Department of Administrative Services. Today we present a summary of the 2019 report. Redesigned in 2017, the HECC KPMs provide a dashboard to track progress toward the state's educational attainment goal (40-40-20) and several underlying mechanisms for achieving that goal equitably.

Materials:

Slide presentation.

Staff Recommendation:

This is an informational and discussion item only.

HIGHER EDUCATION COORDINATING COMMISSION

Annual Report of Key Performance Measures

Meeting of the Higher Education Coordinating Commission

Amy G. Cox, Director

Office of Research and Data

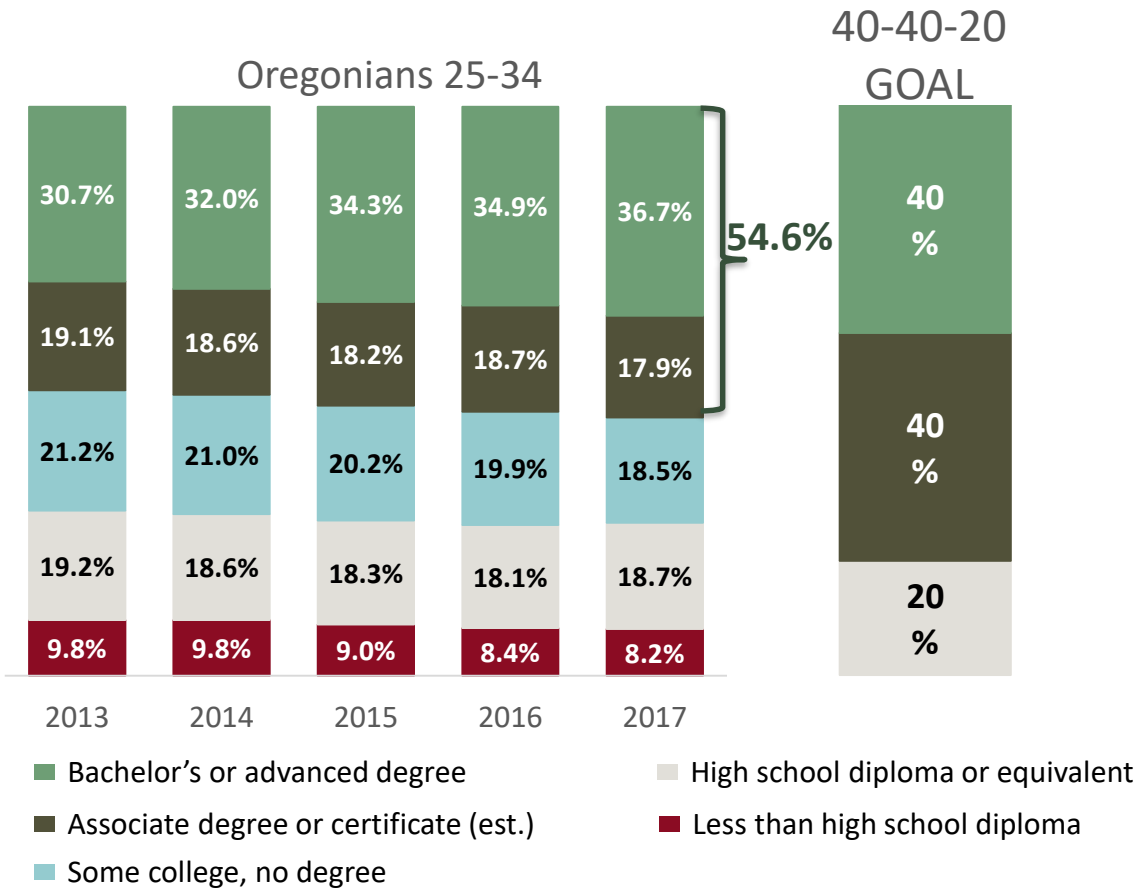
December 12, 2019

40-40-20 remains Oregon's educational north star

KPM #4: Percent of young adults with increasing levels of education and training

The share of young Oregonians with a postsecondary credential continues to grow, but it remains well behind the 80% goal.

The new adult attainment goal complements 40-40-20 to increase attainment among other adults as well.



Adult attainment goal

300,000 adults with new credentials by 2030

Gaps by race/ethnicity, income, and rural/urban cut in half

Source: US Census Bureau American Community Survey (ACS), Table #B15001, 1-year estimates
Estimates of certificate attainment derived from Ewert and Kominski (2014), https://www.census.gov/prod/2014pubs/p70-138.pdf

HIGHER EDUCATION COORDINATING COMMISSION

Our KPMs track progress toward 40-40-20 and the mechanisms to achieve greater attainment and equity

ENTRY
- Accel. learning credits
- College-going rate

AFFORDABILITY
- Unaffordable net cost rate

COMPLETION
- Completion rates

MOBILITY
- 5th year earnings

Number of accelerated learning credits earned per high school graduate

Percentage of public high school graduates enrolling in postsecondary education

Percentage of students with expected costs greater than: Public grant aid + expected family contribution + student earnings

Percentage of students completing degrees, certificates, or transfers

Earnings of completers five years after award

We also include two statewide KPMs: customer service and commission best practices

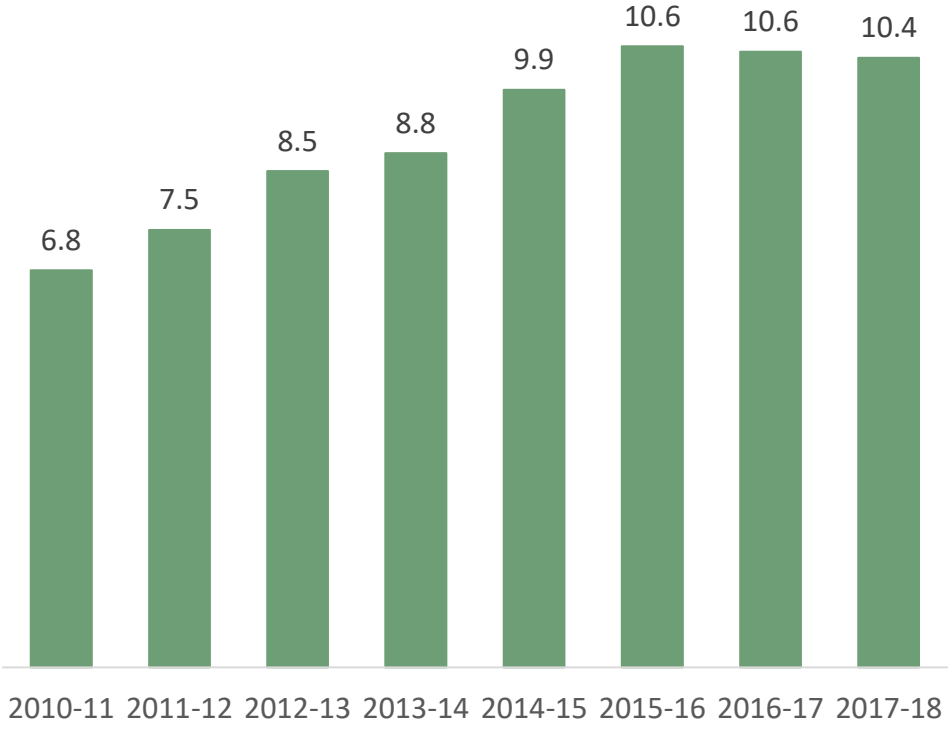
HIGHER EDUCATION COORDINATING COMMISSION

High school graduates earn an estimated 10.4 credits from community colleges and public universities

KPM #3: Amount of postsecondary credit per high school graduate earned by K-12 students from community colleges and public universities

Credit earned through these high school-based partnerships has remained stable for the last three years.

Some students earn additional credit through other kinds of accelerated learning programs.



Source: HECC analysis of university and community college data. Includes only high school students who graduated within 4 years and were enrolled in dual credit or Expanded Options programs.
Notes: These results show an average number of credits per graduate based on the total number of credits earned among all students in pre-kindergarten through senior year in a single academic year.

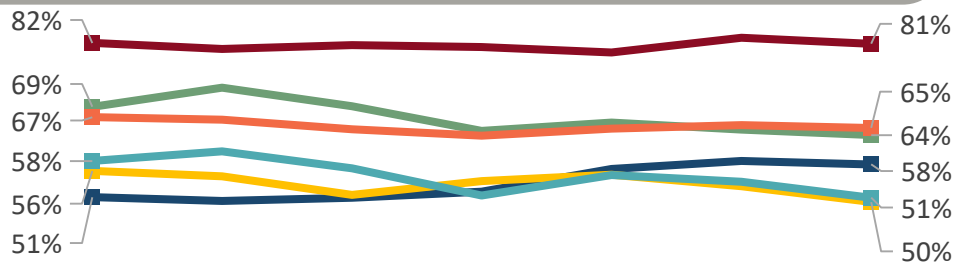
HIGHER EDUCATION COORDINATING COMMISSION

Oregon high school graduates' college-going rate has remained relatively stable

KPM #1-2: Percentage of Oregon high school graduates enrolled in any college nationwide within 16 months of their 4-year high school cohort graduation date

After a slight decline early in the economic recovery, rates have risen very slightly in the last two years. Strong economies and low unemployment tend to draw youth into employment.

By race/ethnicity, many rates have been stable, while the college-going rate of Hispanic/Latinx students has risen.



High school graduation year

2010-11 2011-12 2012-13 2013-14 2014-15 2015-16 2016-17

All students

2010-11 2011-12 2012-13 2013-14 2014-15 2015-16 2016-17

Asian American
Black/African American
Hispanic/Latinx
Native American/Alaska Native
Native Hawaiian/Pacific Island
White

Source: HECC analysis of university and community college data. High school graduates include all students who received a regular four-year diploma, a modified four-year diploma, or a GED within the four years of high school.

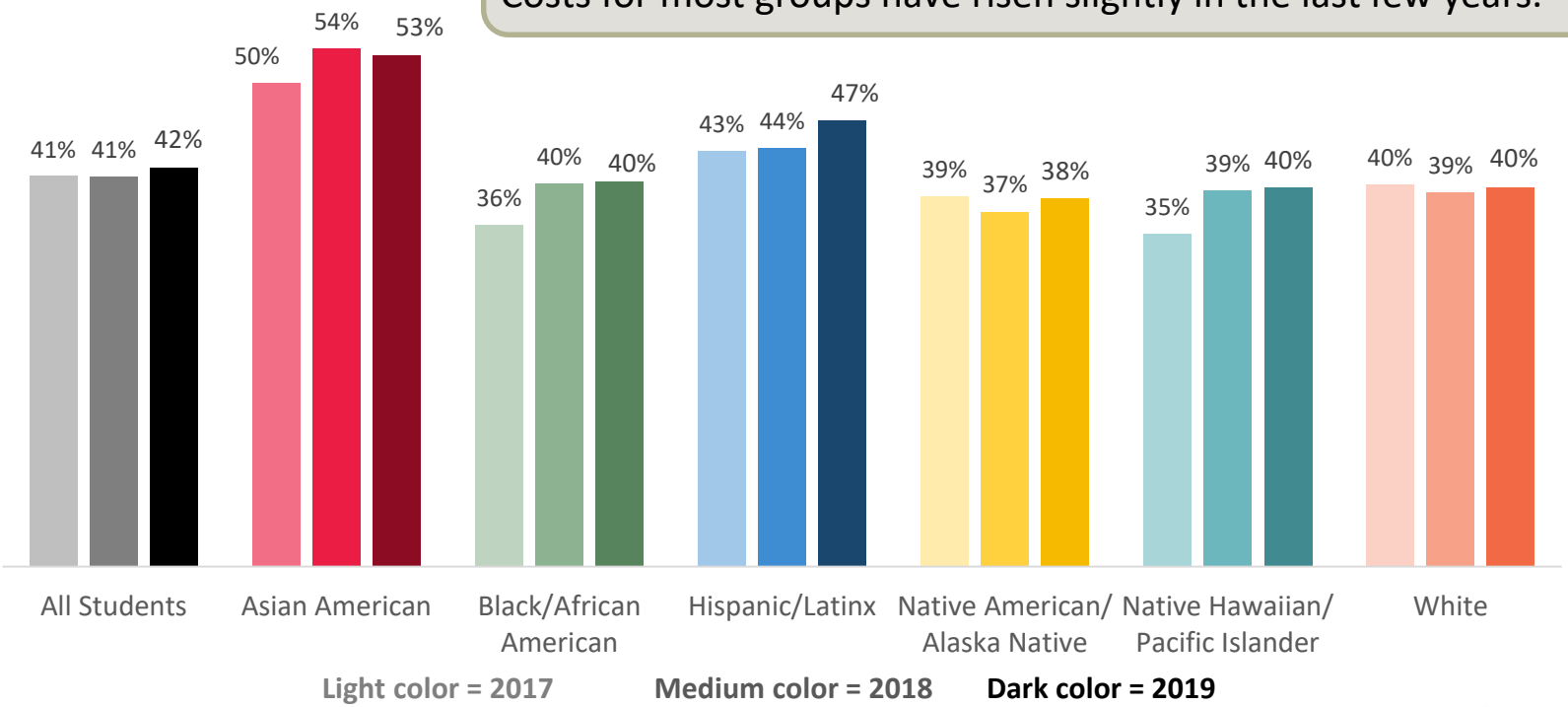
HIGHER EDUCATION COORDINATING COMMISSION

Close to half of students enrolling in public colleges and universities cannot afford the cost

KPM #9-10: Percentage of resident students who cannot meet expected costs after public grant aid, expected family contributions, and estimated student earnings, overall and by race/ethnicity

Asian American students are most likely to face unaffordable costs.

Costs for most groups have risen slightly in the last few years.



Source: HECC analysis of Oregon public university and community college student records.

Notes: Restricted to resident, undergraduate university students and community college students who attempted at least one credit. Limited only to those students who filed a Federal Application for Student Aid (FAFSA).

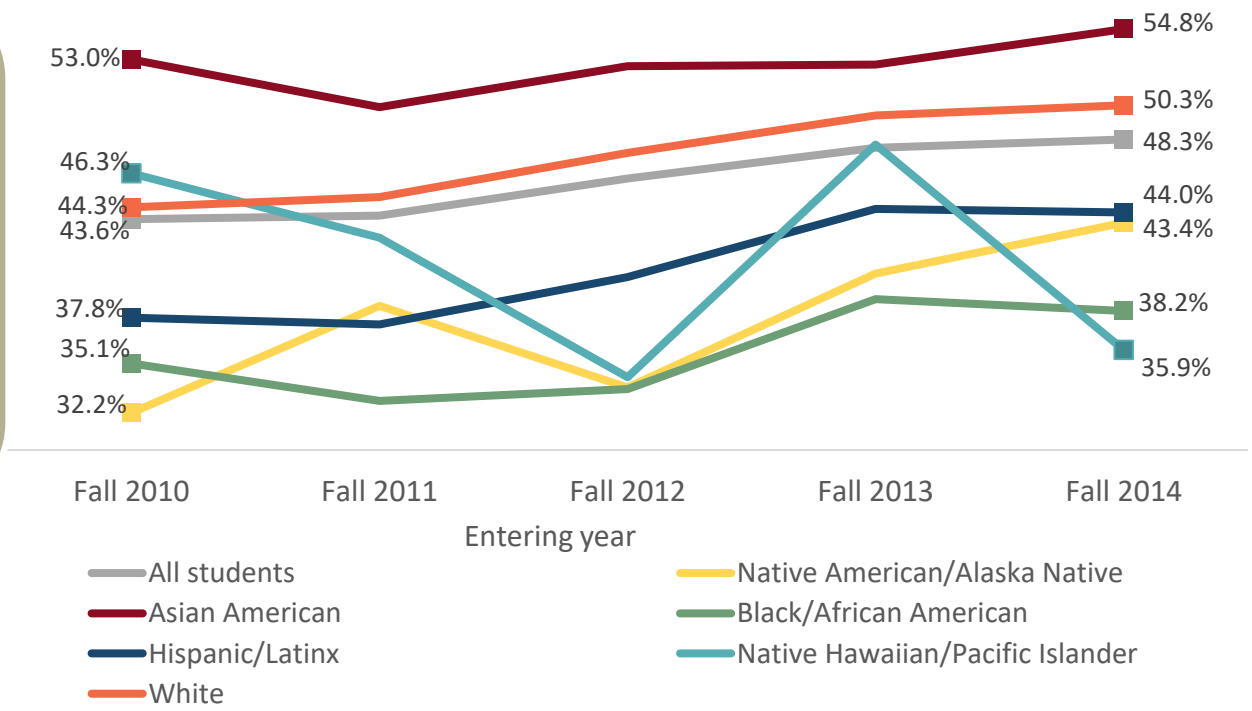
HIGHER EDUCATION COORDINATING COMMISSION

Credential-seeking community college students are more likely to earn an award or transfer today

KPM #5-6: Percentage of credential-seeking community college students who complete a career certificate or associate degree or who transfer to a university within four years, overall and by race/ethnicity

Almost half of new, credential-seeking students at community colleges earn an award or transfer to a university within four years.

Rates have risen steadily for most groups.



Source: HECC analysis of university and community college data .

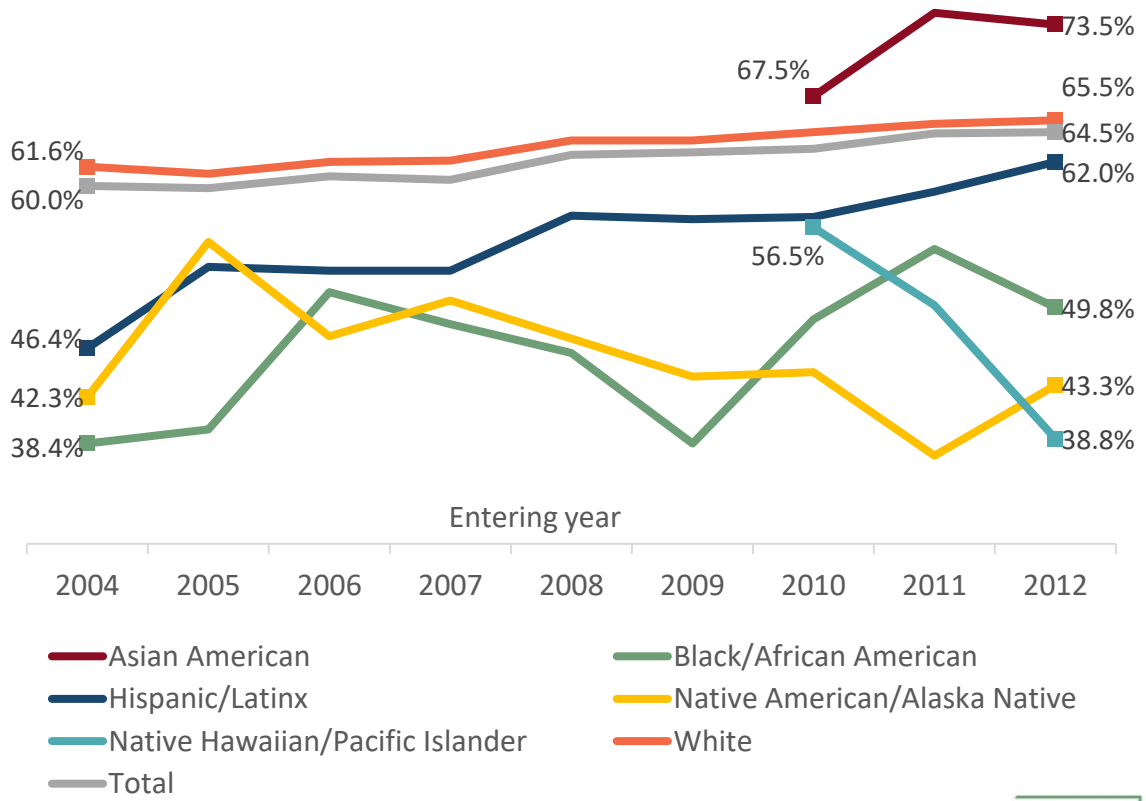
Notes: This KPM uses student behavior to define "credential-seeking" as accumulating 18 or more quarter credits within the period. A student is considered to have transferred if there is any evidence of enrollment at a 4-year university after the last enrollment in the community college and before the end of the three-year tracking period.

HIGHER EDUCATION COORDINATING COMMISSION

Graduation rates at public universities have also been rising, though not for all groups

KPM #7-8: Percentage of public university first-time, full-time freshmen who earn a bachelor's degree within 6 years, overall and by race/ethnicity

Public university graduation rates have risen for Asian American, Hispanic/Latinx, and White students but not for African American or Native American students



<u>Fall 2012 entering cohort</u>
Resident: 64.6%
Nonresident: 64.5%

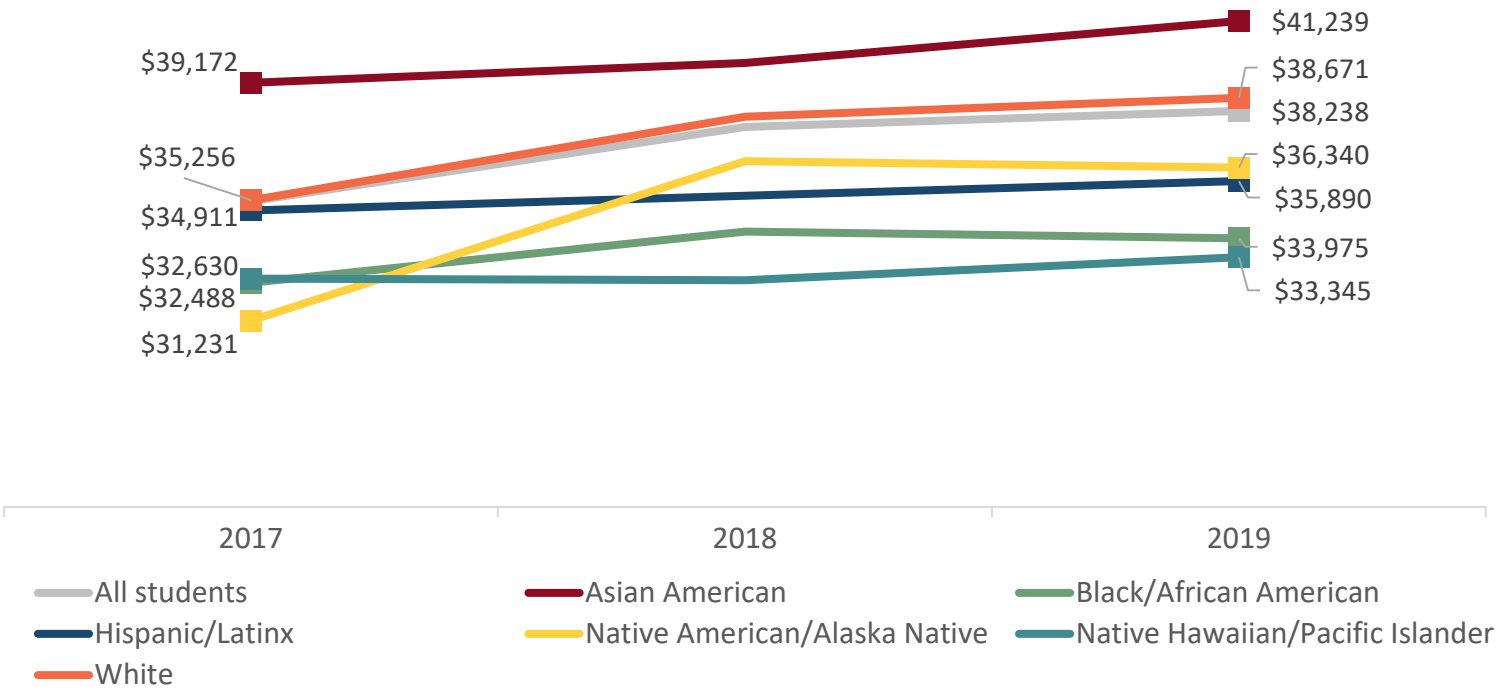
Source: HECC analysis of Oregon public university student records. Includes only first-time, full-time freshmen university students.
Notes: Currently there is no historical data for the Native Hawaiian or Pacific Islander category. Prior to the 2010 cohort, the Asian American group included Native Hawaiian and Pacific Islander categories.

HIGHER EDUCATION COORDINATING COMMISSION

Earnings of community college completers continue to rise in a strong economy

KPM #11-12: Median earnings of community college completers five years after earning a degree or certificate, overall and by race/ethnicity

Earnings of those who completed a certificate or degree have risen steadily for most groups



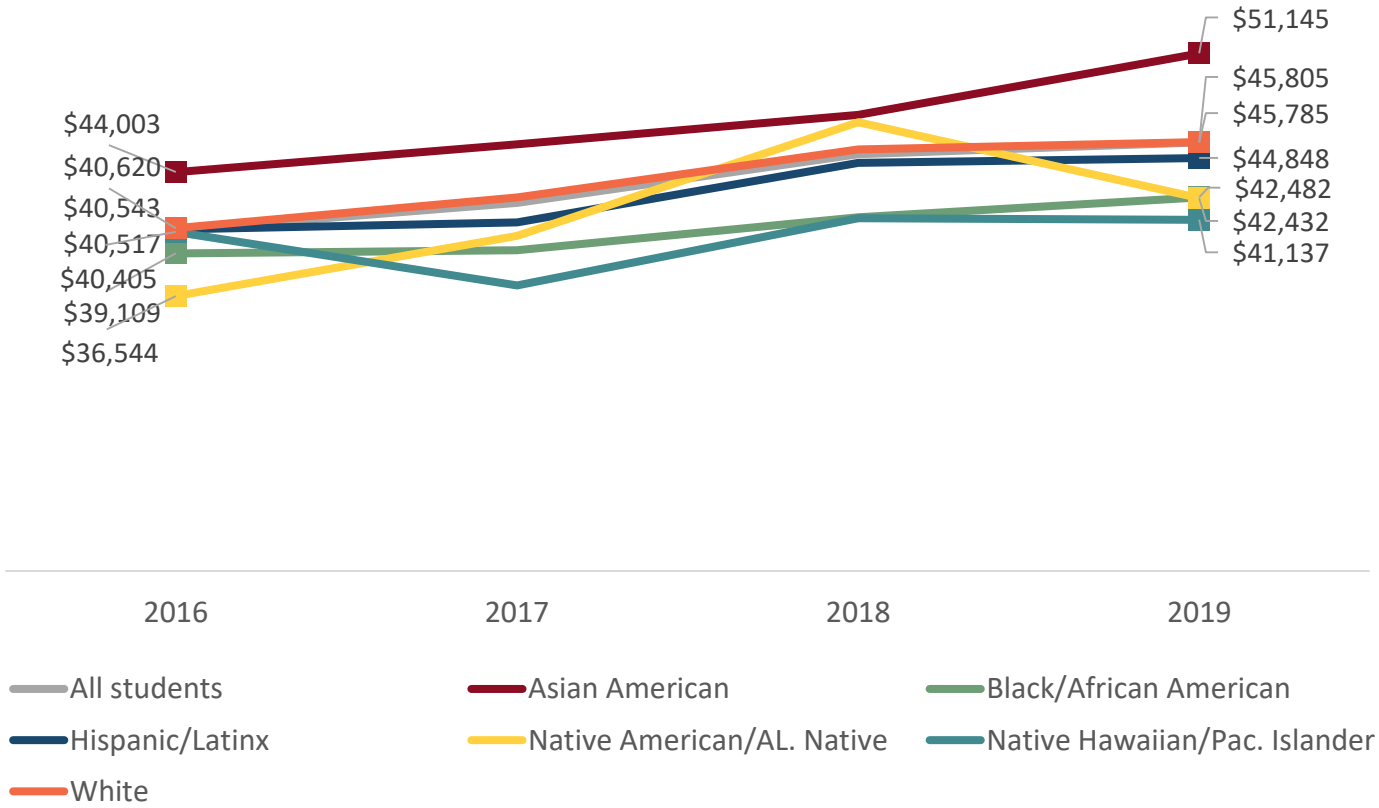
Source: HECC analysis of Oregon community college student records and earnings data from Oregon Employment Department.
Notes: Includes individuals who were awarded a career/technical certificate, Oregon Transfer Module (OTM) certificate, or an associate degree and were employed in Oregon five years later.

HIGHER EDUCATION COORDINATING COMMISSION

…as do earnings of bachelor's degree graduates

KPM #13-14: Median earnings of university graduates with bachelor's degrees, five years after completion, over time and disaggregated by race/ethnicity.

Earnings of those who completed a bachelor's degree have risen steadily for most groups



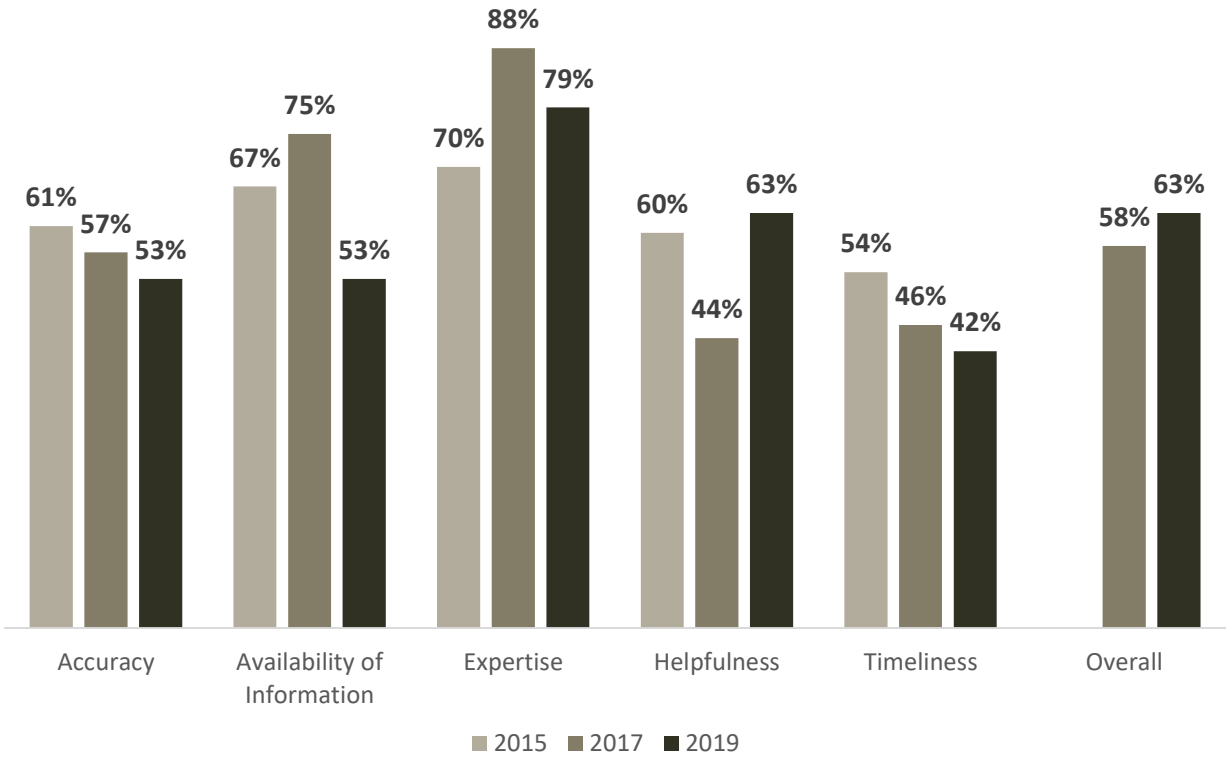
Source: HECC analysis of Oregon community college student records and earnings data from Oregon Employment Department. .
Notes: Includes individuals who were awarded a bachelor's degree and were employed in Oregon five years later.

HIGHER EDUCATION COORDINATING COMMISSION

Agency customer service is a statewide measure

KPM #15: Percentage of customers rating their satisfaction with the agency's customer service as "good" or "excellent": overall, timeliness, accuracy, helpfulness, expertise, availability of information.

HECC constituents expressed less satisfaction with staff expertise than in 2017, but indicated a strong improvement in helpfulness. Availability of information and timeliness continue to show a need for improvement



Source: HECC analysis of survey of stakeholders with a response rate of 40 percent.
Notes: The group of stakeholders for this 2017 survey was different from the 2015 group, making comparisons between the years difficult. The Accuracy category was new to this survey so there is no historical data to provide.

HIGHER EDUCATION COORDINATING COMMISSION

Most measures show progress as well as room for more growth

ENTRY

High school graduates earn 10.4 credits

64% enroll in college

AFFORDABILITY

42% of students face unaffordable costs, even after aid

COMPLETION

48% of community college
65% of public university students complete

MOBILITY

Earnings rise with more education and continue to rise in a strong economy

We will continue to refine how we measure each concept as new sources of data emerge

HIGHER EDUCATION COORDINATING COMMISSION

The Commission continues to model best practices

KPM #16: Commissioners' reports of how well the Commission meets best practices

Question	Percent (strongly) agree
Q1: I am able to devote the time and energy necessary to actively participate in Commission meetings.	100%
Q2: The amount of time expected of commissioners to prepare and participate in Commission meetings is reasonable.	83%
Q3: The amount of time expected of commissioners outside of Commission meetings is reasonable.	83%
Q4: The Commission is effectively utilizing my skills and expertise.	100%
Q 5: I can speak candidly at Commission meetings.	83%
Q6: I can participate in subcommittee meetings in which I am not a subcommittee member.	83%
Q7: Serving on this Commission is satisfying.	100%
Q8. The Commission as a whole has a clear understanding of its role and responsibilities	100%
Q9: The Commission understands and respects the distinction between its responsibilities and those of management.	83%
Q10: Commissioners actively participate in discussions.	83%
Q11: The Commission has diversity of representation (e.g., gender, ethnicity, age, vocation, etc.).	67%
Q12: Commissioners listen to and value each other's comments.	83%
Q13: The leadership of the Commission is effective.	100%
Q14: Public comment during the public comment section of the meeting and during action items is a valuable opportunity to gather input.	100%
Q15: The Commission provides insight and guidance to the HECC's strategic direction.	83%
Q16: The Commission ensures the agency's fiscal integrity by monitoring the agency's financial policies and operating performance and by submitting the agency's biennial budgets.	83%
Q17: The Commission assesses the performance of the Executive Director on an annual basis.	83%
Q18: The Commission follows the highest standards of fiduciary duty and avoids conflict of interest in decision-making.	100%
Q19: The Commission operates in a transparent and open fashion.	100%
Q20: Commission meetings have agendas and materials that are distributed far enough in advance to give them adequate consideration.	100%
Q21: Commission meetings rely on written and presentation materials that provide the right type and amount of information and are clearly written.	83%
Q22: Commission meetings cover the right combination of information-sharing, discussion, decision-making, and board education.	83%
Q23: Commission meetings allow enough time for the exchange of ideas and thoughtful deliberation.	83%
Q24: Commission meetings strike the right balance between long-range, strategic matters and routine matters of oversight.	83%

Source: HECC analysis of survey of Commissioners with a response rate of 69 percent.
Notes: The survey included 24 rated questions and 3 open-ended questions. This survey contained different questions from the previous survey in 2015 making comparisons between the years not possible.

HIGHER EDUCATION COORDINATING COMMISSION

HECC Key Performance Measures

KPM	Description
1	College-going rate among Oregon high school graduates, total
2	College-going rate among Oregon high school graduates by race/ethnicity
3	Accelerated learning credits per Oregon high school graduate
4	State attainment goal: 40-40-20
5	Community college completion and transfer rate, total
6	Community college completion and transfer rate, by race/ethnicity
7	Public university graduation rate, total
8	Public university graduation rate, by race/ethnicity
9	Unaffordability of public postsecondary education, total
10	Unaffordability of public postsecondary education, by race/ethnicity
11	Earnings of community college completers, total
12	Earnings of community college completers, by race/ethnicity
13	Earnings of public university graduates, total
14	Earnings of public university graduates, by race/ethnicity
15	Customer service satisfaction
16	Commission/board best practices

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HIGHER EDUCATION COORDINATING COMMISSION
December 12, 2019
Docket Item #: 9.2

Docket Item:

Public University Evaluation Drafts (WOU, SOU, EOU, OIT) (in accordance with ORS 352.061)

Summary:

The Higher Education Coordinating Commission is required to submit to the Legislature an evaluation of each Oregon public university once every two years. As part of the evaluation submitted to the Legislature, the Commission may make recommendations regarding the ability of the university to meet academic goals and fulfill its fiduciary responsibilities.

Under ORS 352.061, the evaluation must include:

- A report on the university's achievement of outcomes, measures of progress, goals and targets;
- An assessment of the university's progress toward achieving the mission of all education beyond high school as described in ORS 350.014; and
- An assessment as to how well the establishment of a governing board at the university comports with the findings set forth in ORS 352.025.

This year the HECC will evaluate four institutions: Western Oregon University, Southern Oregon University, Eastern Oregon University, and Oregon Tech. These evaluations rely on a combination of institutional accreditation reports, self-assessments, and criteria jointly developed with the HECC. The reports will focus on key areas of interest to the HECC that support state higher education objectives: 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; continued collaboration across institutions; and adherence to legal responsibilities required of institutional Boards of Trustees.

Today's materials reflect a staff summary of information derived from HECC data and institutional self-reports, aligned with the major evaluative categories. Institutional leaders have reviewed the summaries; staff has incorporated many of their suggestions. Based on feedback from the Commission, staff will prepare comprehensive evaluations for the Commission's consideration and adoption at its February 2020 meeting.

Docket Material:

Attachment: University evulation summary points for:

- Western Oregon University
- Southern Oregon University
- Eastern Oregon University
- Oregon Tech

Staff Recommendation:

This is an informational and discussion item only.

DRAFT Summary Points
Western Oregon University Evaluation
December 2019

ORS 352.061 requires the HECC to conduct annual evaluations of public universities in Oregon according to specific statutory criteria. Overall, the HECC's approach is to assess the university's contributions to statewide goals for higher education. We do not purport to conduct a comprehensive evaluation of the university against its own mission. A summary of key findings follows:

1. **Accreditation**: WOU is accredited by the Northwest Commission on Colleges and Universities (NWCCU), and is fully on track with the 7-year NWCCU cycle for accreditation. WOU was last reaffirmed for accreditation in 2016 following its Year Seven (Mission Fulfillment and Sustainability) review. NWCCU recommended that WOU focus on defining its mission fulfillment and accomplishment and establish objectives and outcomes of each core theme and learning outcomes for all courses, programs, and degrees. WOU submitted the next Year One (Mission and Core Themes) report following a substantive change proposal from WOU with respect to mission and core themes that NWCCU had not yet acted upon. Per NWCCU direction WOU resubmitted the Year One report along with the Year Three report in March 2019. The two reports combined address all outstanding recommendations.
2. **Economic impact**: A 2019 Economic Impact study by ECONorthwest found that in 2017 WOU's economic impact to Polk County was $223,587,508 and capital construction contributed an additional $9,705,237 to the county. The addition of a new campus in Salem in 2019 will expand the economic impact of WOU in future years.
3. **Student access and student success:** WOU's Fall 2019 enrollment is the lowest it has been in over a decade. Resident enrollment is down 10.0% since 2015 and 14.6% since 2008; while non-resident enrollment has decreased 10.9% year-over-year, it is up 13.0% since 2011 and 27.8% since 2008. Conversely, the number of underrepresented minority students enrolled at WOU continues to grow and now represents 27.4% of the university's total population— the largest percentage at any Oregon public university. Resident students account for 77.9% of the student population. WOU awarded 1,391 total degrees in 2018-19; that is 1.4% more than the previous year and the most it has awarded since 2012-13 when it awarded 1,430 degrees. WOU awarded 9.9% more bachelor degrees in 2018-19 than in the prior year. WOU's six-year graduation rate is 48.5% for Pell Grant recipients, 50.7% for underrepresented minority students, and 50.4% for all students.
4. **Affordability:** From 2018-19 to 2019-20, Western Oregon University's resident undergraduate tuition and fees increased by 2.39%. The estimated total cost of attendance increased by 0.82% to $23,853. For Western Oregon University graduates who leave the university with federally backed debt, their median debt load was between $21,095 and $28,583. Sixty-nine percent of all undergraduate students in the 2017-18 academic year received such federally backed loans.

5. **Academic Quality and Research:** In addition to maintaining good standing with its regional accreditor, WOU is commended for its commitment for the access and success of first generation and low income students. For 2017-18, WOU reported total research expenditures of approximately $8.0 million. For 2018-19, WOU reported total research expenditures of approximately $8.7 million.
6. **Collaboration:** WOU contributes to a host of collaborative activities with other post-secondary institutions, including a decade-long dual enrollment partnership with Chemeketa Community College. It is the first public university in Oregon initiating and leading the WICHE Passport Initiative. WOU's Willamette Promise program served 2,645 high school students in 2017-18. The Bilingual Teacher Scholars Program works with K12 school districts and community colleges to address a

critical and growing workforce need that is aligned with the priorities identified within the Oregon Student Success Act.

7. **Shared administrative services:** WOU participates in most of the services offered by the University Shared Services Enterprise (USSE).
7. **Financial Condition Analysis:** *HECC staff is in the process of expanding the fiscal analysis section of the university evaluations in order to provide a better contextual understanding of institutions' financial conditions. The new analyses will include trend data and additional financial metrics, along with financial ratios that have been reported in previous university evaluations. Preliminary calculations are not available as the calculations will be completed once the financial audits are concluded for FY 2019 in mid-December.*
8. **Board of Trustees**: In 2019, the WOU Board of Trustees appears to have met its legal responsibilities for providing public notice, accessibility, and records. In 2019, the Board exercised many of the powers reserved for it under law, including presidential oversight, budget adoption, tuition adoption, debt issuance, and program approval (for HECC consideration). HECC has approved four programs since the last time WOU was evaluated in 2017: M.S. in Organizational Leadership, AB in Liberal Studies, B.A./B.F.A. in Art and Design, and a B.A./B.S. in Sustainability.

DRAFT Summary Points
Southern Oregon University Evaluation
December 2019

ORS 352.061 requires the HECC to conduct annual evaluations of public universities in Oregon according to specific statutory criteria. Overall, the HECC's approach is to assess the university's contributions to statewide goals for higher education. We do not purport to conduct a comprehensive evaluation of the university against its own mission. A summary of key findings follows:

1. **Accreditation**: SOU is fully accredited by the Northwest Commission on Colleges and Universities (NWCCU). It was last affirmed in 2017 for accreditation following its Year Seven (Mission Fulfillment and Sustainability) evaluation. The Year One report on core themes, objectives and indicators was submitted in January 2018. It included an *ad hoc* report to address recommendations for assessment of their previously defined core themes made during the Year Seven evaluation. The Year Three report, submitted in September 2019, focused on ensuring continuous integration of core themes with ongoing assessment activities. A response from NWCCU is pending.
2. **Economic impact**: The draft 2019 Economic Impact Statement written by ECONorthwest estimates the economic impact of the SOU in October 17-18 was $282 million, a 19% increase since the 2013-14 impact study.
3. **Student access and student success:** SOU's Fall 2019 enrollment is the lowest it has been in a decade. Total head count is up 17.4% since 2008, but is down 11.5% from its post-recession peak in 2011. SOU's enrollment of underrepresented students has steadily increased, representing an 81.6% growth since 2010 and a 14.8% growth since 2015. Enrollment increases since 2017 have been driven by resident students. Total student enrollment, however, has declined 7.4% since 2010. Resident students account for roughly 70% of SOU's student body. The number of degrees awarded annually has declined by 3.3% between the 2017-18 and 2018-19 academic year; however, the number of bachelor degrees awarded in 2018 is the highest it has been since 2013. The most recent six-year graduation rate is 44.9% for Pell Grant recipients, 41.0% for underrepresented minority students, and 48.8% for all students, a record high. SOU is steadily increasing the number of degrees awarded to underrepresented minority students and in 2018 awarded 245 degrees to such students — the most since 2011.
4. **Affordability:** From 2018-19 to 2019-20, Southern Oregon University's resident undergraduate tuition and fees increased by 8.99%. The estimated total cost of attendance increased by 4.73% to $28,854. For Southern Oregon University graduates who leave the university with federally backed debt, their median debt load was between $15,801 and $25,250. Thirty-nine percent (39%) of all undergraduate students in the 2017-18 academic year received such federally backed loans.
5. **Academic Quality and Research:** SOU maintains good standing with its regional accreditor. For 2017-18, SOU reported total research expenditures of approximately $681,000, an increase from the previous year. For 2018-19 SOU reported total research expenditures of approximately $463,300.
6. **Collaboration:** In November 2018, the presidents of Southern Oregon University (SOU), Oregon Institute of Technology (Oregon Tech), Rogue Community College (RCC) and Klamath Community College (KCC) formed the Southern Oregon Higher Education Consortium (SOHEC), Oregon's first regional coalition of colleges and universities. During the past year SOHEC has created a website,

shared housing, explored collaborative academic programming, worked on developing dual admission, improved transfer and developed or implemented additional programs.

7. **Shared administrative services:** SOU participates in all of the appropriate services offered by the University Shared Services Enterprise (USSE).
8. **Financial Condition Analysis:** *HECC staff is in the process of expanding the fiscal analysis section of the university evaluations in order to provide a better contextual understanding of institutions' financial conditions. The new analyses will include trend data and additional financial metrics, along with financial ratios that have been reported in previous university evaluations. Preliminary calculations are not available as the calculations will be completed once the financial audits are concluded for FY 2019 in mid-December.*
9. **Board of Trustees**: In 2019, the SOU Board of Trustees met its legal responsibilities for providing public notice, accessibility, and records. In 2019 the Board exercised many of the powers reserved for it under law, including presidential oversight, budget adoption, tuition adoption, debt issuance, and program approval (for HECC consideration). HECC has approved one program since the last time SOU was evaluated: B.A./B.S. in Digital Cinema.

DRAFT Summary Points
Eastern Oregon University Evaluation
December 2019

ORS 352.061 requires the HECC to conduct annual evaluations of public universities in Oregon according to specific statutory criteria. Overall, the HECC's approach is to assess the university's contributions to statewide goals for higher education. We do not purport to conduct a comprehensive evaluation of the university against its own mission. A summary of key findings follows:

1. **Accreditation**: EOU is accredited by the Northwest Commission on Colleges and Universities (NWCCU), and is fully on track with the 7-year cycle for accreditation. EOU was last affirmed for accreditation following its Year Seven (Mission Fulfillment and Sustainability) review in Fall 2018 at which point all previous recommendations from NWCCU were fulfilled. EOU received five commendations/points of praise and four recommendations for areas where the institution is substantially in compliance but in need of improvement. The next accreditation activity, Year One (Mission and Core Themes) report, is due in Spring 2020.
2. **Economic impact**: A 2012 report identified EOU as one of the three largest employers in Union County. With a budget of $45 million, it is a key economic and cultural driver in this rural part of the state.
3. **Student access and student success:** Fall 2019 enrollment showed a year-over-year increase in total enrollment for the first time since 2011, but a decrease of 16.3% since 2008 and 28.6% since 2011. EOU's enrollment of underrepresented students has steadily increased over the last decade representing a 65.2% increase since 2010 and a 74.3% increase since 2015. EOU currently enrolls the highest number of underrepresented minority students in its recent history. This year, resident students account for 66.4% of EOU's total student body. EOU's six-year graduation rate is 30.4% for Pell Grant recipients, 30.9% for underrepresented minority students, and 38.1% for all students. In 2018-19 EOU had the lowest number of completions since the 2012-13 academic year. EOU awarded 6.5% fewer degrees in 2018-19 than the prior year, continuing a declining trend that began in 2016. The number of degrees awarded to underrepresented minority students has increased by 4.9 percentage points year-over-year, and is 88.2% above the 2010-11 academic year total.
4. **Affordability:** From 2018-19 to 2019-20, Eastern Oregon University's resident undergraduate tuition and fees increased by 4.86%. The estimated total cost of attendance increased by 3.71% to $23,505. For Eastern Oregon University graduates who leave the university with federally-backed debt, their median debt load was between $18,291 and $27,388. Fifty two percent (52%) of all undergraduate students in the 2017-18 academic year received such federally backed loans.
5. **Academic Quality and Research:** EOU maintains good standing with its regional accreditor. For 2017-18, EOU reported total research expenditures of approximately $676,000, and for 2018-19 total research expenditures of approximately $642,000.
6. **Collaboration:** EOU contributes to a host of collaborative activities with other post-secondary institutions and partners with 40 high schools across Oregon. EOU maintains a longstanding campus partnership with OSU and OHSU that dates back to the mid-1980s. EOU's "Start There, Finish Here" Pathways program continues to be a successful option for students who begin their post-secondary education at a community college.
7. **Shared administrative services:** EOU participates in the majority of the services offered by the

University Shared Services Enterprise (USSE).

7. **Financial Condition Analysis:** *HECC staff is in the process of expanding the fiscal analysis section of the university evaluations in order to provide a better contextual understanding of institutions' financial conditions. The new analyses will include trend data and additional financial metrics, along with financial ratios that have been reported in previous university evaluations. Preliminary calculations are not available as the calculations will be completed once the financial audits are concluded for FY 2019 in mid-December.*
8. **Board of Trustees**: In 2019, the EOU Board of Trustees appears to have met its legal responsibilities for providing public notice, accessibility, and records. In 2019, the Board exercised many of the powers reserved for it under law, including presidential oversight, budget adoption, tuition adoption, debt issuance, and program approval (for HECC consideration). HECC has approved the following programs since the last time EOU was evaluated: B.A./B.S./B.A.S. in Informational Technology Management and B.A./B.S. in Accounting.

DRAFT Summary Points
Oregon Institute of Technology Evaluation
December, 2019

ORS 352.061 requires the HECC to conduct annual evaluations of public universities in Oregon according to specific statutory criteria. Overall, the HECC's approach is to assess the university's contributions to statewide goals for higher education. We do not purport to conduct a comprehensive evaluation of the university against its own mission. A summary of key findings follows:

1. **Accreditation**: Oregon Tech is accredited by the Northwest Commission on Colleges and Universities (NWCCU), and is fully on track with the 7-year NWCCU cycle for accreditation. It was last reaffirmed for accreditation in Spring 2016 following the Year Seven (Mission Fulfillment and Sustainability) review. NWCCU issued five recommendations, including that Oregon Tech develop an agreement that clearly defines the relationship between Oregon Tech and its Foundation; that Oregon Tech develop and enforce a policy for credit for prior learning assessment, and three others related to assessment practices. Oregon Tech has addressed these recommendations in three *ad hoc* reports. Oregon Tech has also submitted the Year One (Mission and Core Themes) Report (March 2017). Its Year Three Report was submitted in March 2019. A response from NWCCU is pending.
2. **Economic impact**: A 2016 ECONorthwest report estimates the economic impact of the OIT in FY15 as $75 million in Klamath County and an additional $32 million in the Portland metro region.
3. **Student access and student success:** Enrollment at Oregon Tech peaked in the Fall of 2017, and the institution has since seen a 3.1% decrease in total headcount since. Resident students have increased 13.7% since 2015 when compared to their non-resident counterparts, whose numbers grew by 3.5% over the same timeframe. In Fall 2019, resident students make up 76.7% of the total student body. Over a ten-year period, total enrollment is up 35.4%. OIT awarded 4.7% more degrees in 2018-19 than the prior year. The six-year graduation rate for Pell Grant recipients is 57.2%, slightly higher than the university's overall graduation rate of 55.2% and for underrepresented minority students (51.7%). Oregon Tech currently enrolls 971 underrepresented minority students, an increase of 92.3% since Fall 2010.
4. **Affordability:** From 2018-19 to 2019-20, Oregon Tech's resident undergraduate tuition and fees increased by 5.26% at its main Klamath Falls campus and by 5.81% at their Wilsonville campus. For Oregon Tech graduates who leave the university with federally-backed debt, their median debt load was between $19,000 and $29,000. Thirty five percent (35%) of all undergraduate students in the 2017-18 academic year received such federally backed loans.
5. **Academic Quality and Research:** In addition to maintaining in good standing with its regional accreditor, Oregon Tech is very active in applied research in engineering, technology, applied sciences and medical fields. For 2017-18 Oregon Tech reported total research grant awards of approximately $14 million. That number climbed to $17 million in 2018-19.
6. **Collaboration:** Oregon Tech has been developing articulation agreements for over 30 years. 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. The University also 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. Oregon Tech is also a member of the Southern Oregon Higher Education Consortium (SOHEC) that was formed in November 2018 in collaboration with SOU, RCC and KCC.

7. **Shared administrative services:** OIT participates in all of the services offered by the University Shared Services Enterprise (USSE).
8. **Financial Condition Analysis:** *HECC staff is in the process of expanding the fiscal analysis section of the university evaluations in order to provide a better contextual understanding of institutions' financial conditions. The new analyses will include trend data and additional financial metrics, along with financial ratios that have been reported in previous university evaluations. Preliminary calculations are not available as the calculations will be completed once the financial audits are concluded for FY 2019 in mid-December.*
9. **Board of Trustees**: In 2019, the OIT Board of Trustees appears to have met its legal responsibilities for providing public notice, accessibility, and records. In 2019, the Board exercised many of the powers reserved for it under law, including presidential oversight, budget adoption, tuition adoption, debt issuance, and program approval (for HECC consideration). HECC approved three programs since the last time Oregon Tech was evaluated: B.S. in Cybersecurity, Doctor of Physical Therapy, and a B.S. in Data Science.

HIGHER EDUCATION COORDINATING COMMISSION
255 Capitol Street NE, Salem, OR 97310
www.oregon.gov/HigherEd

HIGHER EDUCATION COORDINATING COMMISSION
December 12, 2019
Docket Item #: 9.3

Docket Item:

Oregon Opportunity Grant Annual Report (House Bill 2407, 2015)

Summary:

The Oregon Opportunity Grant (OOG) is Oregon's largest state-funded, need-based grant program for college students. From its inception in 1971, the program has undergone many changes in how grant funds are awarded, the amount of funds awarded, and the eligibility criteria for recipients of OOG funds. In 2015, the Oregon Legislature passed HB 2407, which provided for several changes to the awarding methodology for the OOG.

HB 2407 also requires the Commission to produce an evaluative report annually on or before February 1 to committees of the Legislature related to higher education with a focus on the effect of legislative changes on the academic success and performance of OOG recipients. The first such annual report must be filed by February 1, 2020. This first report presents findings from HECC's analysis of the 2015 policy change on undergraduate students with the highest financial need.

Docket Material:

Attachment: Draft Report, *Oregon Opportunity Grant: Annual Evaluation, 2020*.

Staff Recommendation:

Staff recommends approval of the draft report, with HECC staff authorized to finalize, edit, and submit to the Legislature prior to February 1, 2020.

HIGHER EDUCATION COORDINATING COMMISSION

OREGON OPPORTUNITY GRANT: 2020 REPORT

Office of Student Access and Completion

Juan Baez-Arevalo, Director
Susan Degen, Grants Manager
Erin Pischke, Research Analyst

December 12, 2019

Report Purpose

- Measure impact of 2015 policy change to OOG awarding procedures
  - Changed award priority to students with 'greatest financial need'
  - Previously was first-come, first-serve
- HB 2407 provision: first annual evaluative report of OOG due to legislature in February 2020

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OOG Overview

- Oregon's largest and oldest state-funded, need-based grant program (est. 1971)
- Awardees must be Oregon residents with demonstrated financial need attending an eligible Oregon college/university
  - 'Financial need' measured by Adjusted Gross Income (AGI) through 2014-15
  - Beginning in 2016-7: prioritized awards to students with highest financial need, as measured by Expected Family Contribution (EFC)

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IMPACT ON STUDENTS

Policy Change
Impact

Student Outcomes

Status & Successes

2015 Policy Change

- Demographics of OOG recipient population have remained consistent before and after change
- EFC for OOG award originally set at $4,000 after policy change
  - Adjusted to $3,500 for 2017-18 school year and has remained at that level since

Student Representation

- Equity-minded growth over past 10 years of program
  - nearly 20% recipients are Hispanic/Latinx; faster growth than non-recipient population
- ~40% of OOG recipients are first-generation college students, compared to 15-20% of non-recipients *[public colleges only data]*

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Students with OOG Award by Income Range

More than half of OOG recipients were from the sub-$20,000 income range

Income Range	2014-15	2015-16	2016-17
Under $20,000	$30,869,024	$33,529,961	$40,673,259
$20,000 – 50,000	$19,630,609	$23,107,706	$25,278,449
Over $50,000	$6,804,672	$7,686,793	$3,187,866
Grand Total	$57,304,305	$64,324,460	$69,139,574

Income Range	2014-15	2015-16	2016-17
Under $20,000	53.87%	52.13%	58.83%
$20,000 – 50,000	34.26%	35.92%	36.56%
Over $50,000	11.87%	11.95%	4.61%

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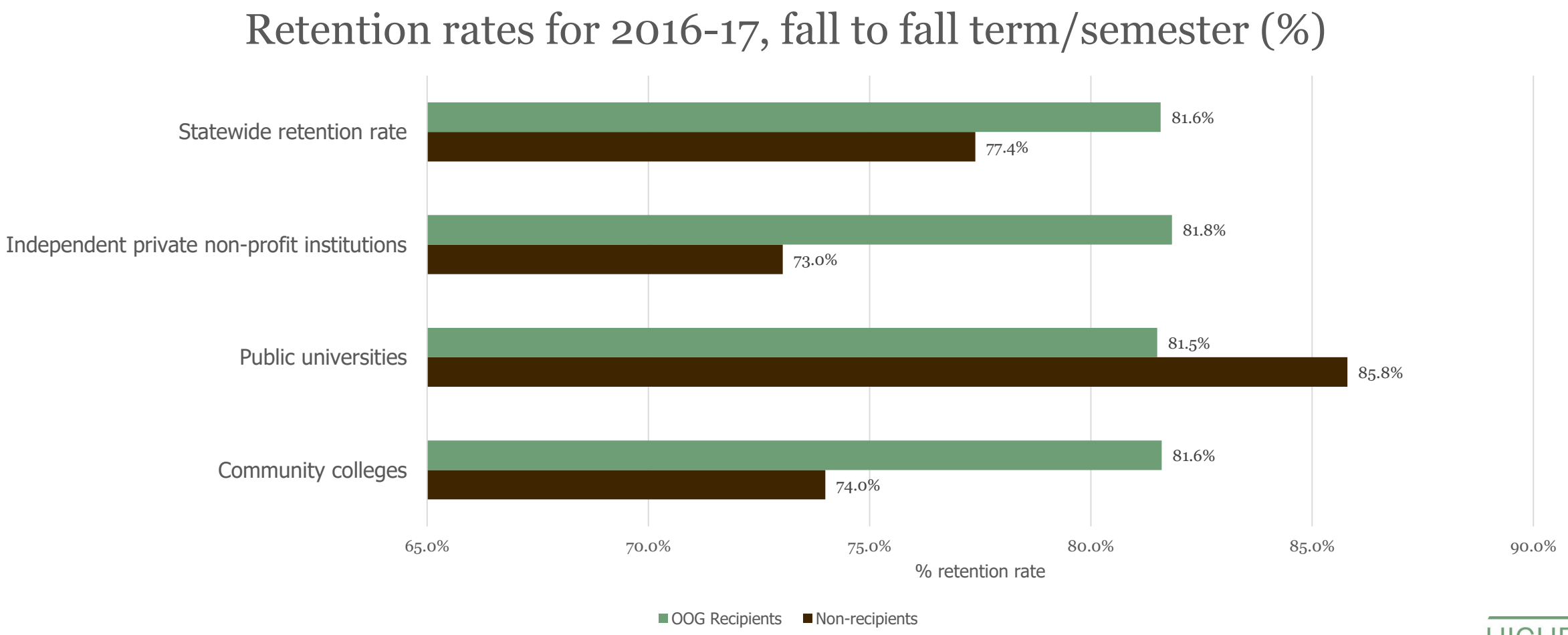
OOG Recipient Cohort Retention



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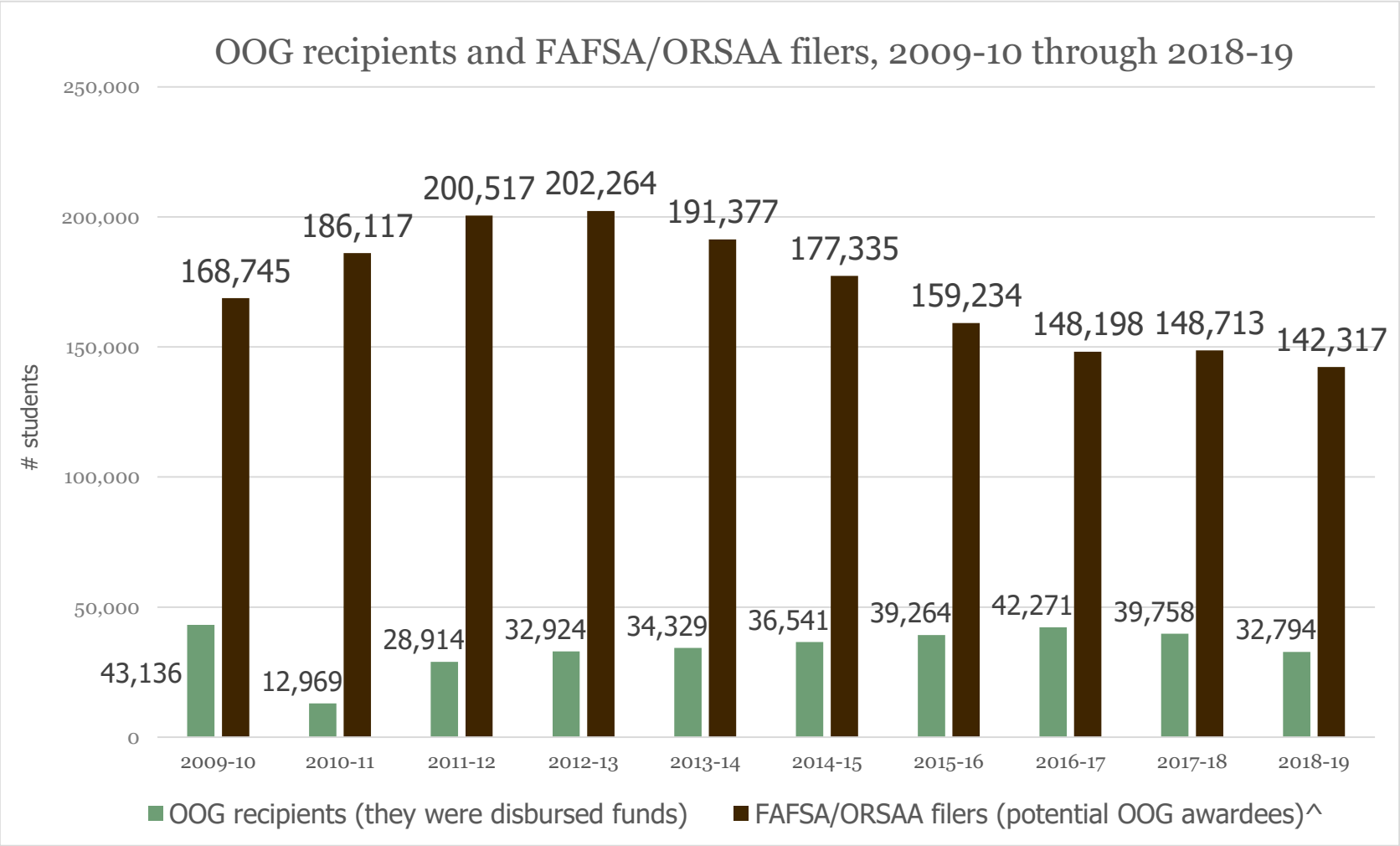
PROGRAM FUNDING

Ability to Serve

Cost of Higher Ed

Future Paths

Served & Unserved Students



FAFSA/ORSAA filers^ = undergraduate Oregonians who attend an Oregon college/university and have at least one term of remaining OOG eligibility

Small Portion of OOG Applicants Receive Award

The EFC level to get OOG is lower than that of the federal Pell Grant.

Due to lack of funding, a heavy majority of eligible applicants do not receive OOG

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Rising Costs: Community Colleges

Cost of Attendance (COA)

Community Colleges	Average Tuition & Fees	Average full COA	Average COA, after max Pell	Maximum OOG award	Purchase Power of OOG
2009-10	$3,584	$15,404	$10,054	$2,600	**26%**
2018-19	$5,461	$20,485	$14,390	$2,600	**18%**

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Rising Costs: 4-Year Institutions

Public universities	Average Tuition & Fees	Average full COA	Average COA, after max Pell	Max OOG award	Purchase Power of OOG
2009-2010	$6,716	$18,536	$13,186	$2,675	**20%**
2018-2019	$10,208	$25,232	$19,137	$3,200	**17%**

Private non-profits	Average Tuition & Fees	Average full COA	Average COA, after max Pell	Max OOG award	Purchase Power of OOG
2009-2010	$25,666	$37,486	$32,136	$2,675	**8%**
2018-2019	$35,195	$50,219	$44,124	$3,200	**7%**

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Cost of Attendance, after Grants

	Year	Community colleges	Public universities	Independent private non-profits
Average full cost of attendance	2009-10	$15,404	$18,536	$37,486
	2018-19	$20,485	$25,232	$50,219
Maximum federal Pell Grant amount	2009-10	$5,350	$5,350	$5,350
	2018-19	$6,095	$6,095	$6,095
Maximum OOG award amounts	2009-10*	$2,600	$2,675	$2,675
	2018-19	$2,600	$3,200	$3,200
Remaining cost	2009-10	$7,454	$10,511	$29,461
	2018-19	**$11,790**	**$15,937**	**$40,924**

Projections with a student (0 EFC) attending full-time, full-year. COA includes average non-tuition costs across all sectors.

**SRM calculation method this year caused award to top out at $2,675 for most students.*

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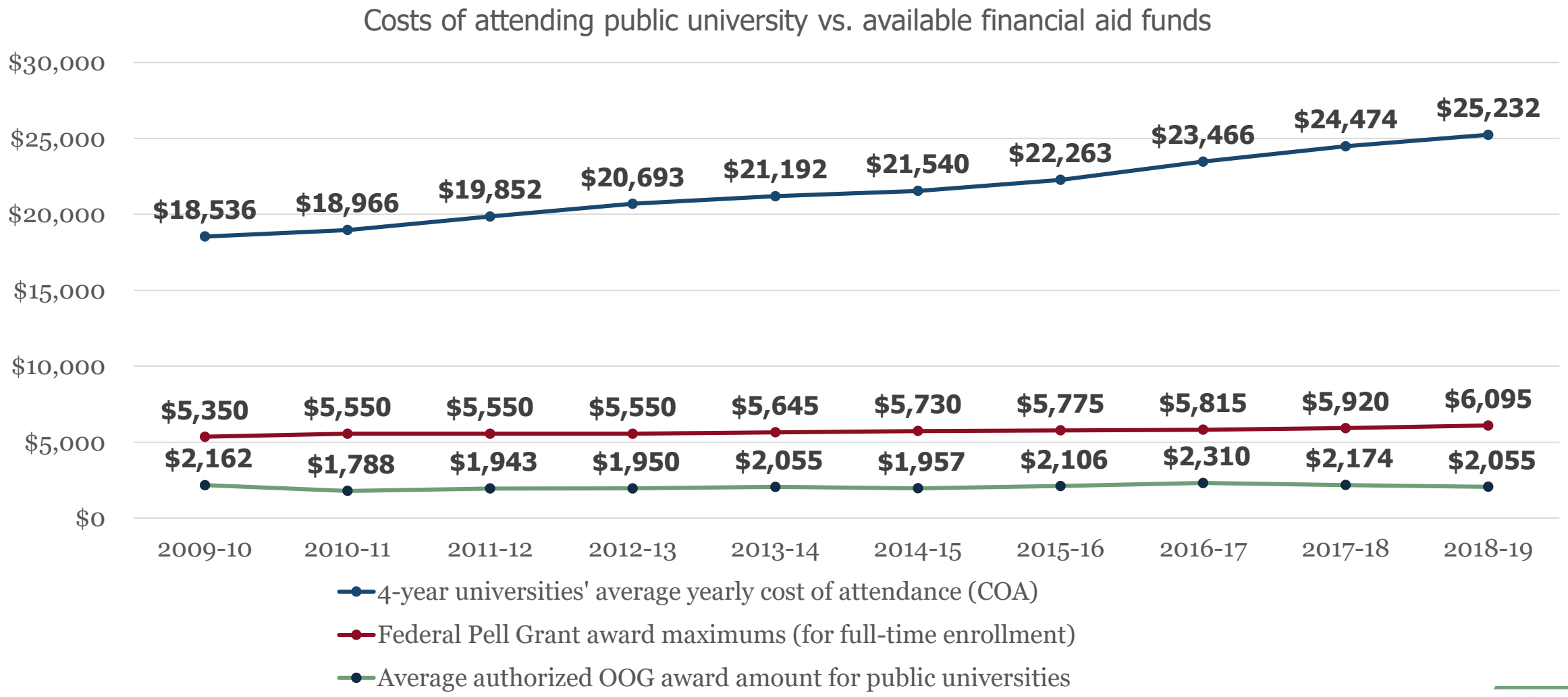
Reduced Purchasing Power



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OOG's Purchasing Power on COA

Average COA			
	Community colleges	Public universities	Private colleges
2009-10	$15,404	$18,536	$37,486
2018-19	**$20,485**	**$25,232**	**$50,219**
% Change	+33%	+36%	+34%

Maximum OOG award amounts			
	Community colleges	Public universities	Private colleges
2009-10	$2,600	$2,675	$2,675
2018-19	**$2,600**	**$3,200**	**$3,200**

COA after maximum Pell Grant			
	Community colleges	Public universities	Private colleges
2009-10	$10,054	$13,186	$32,136
2018-19	**$14,390**	**$19,137**	**$44,124**

Purchasing Power of OOG Award (remaining COA covered by OOG after max Pell Grant)			
	Community colleges	Public universities	Private colleges
2009-10	26%	20%	8%
2018-19	**18%**	**17%**	**7%**

Figures above are for full-time, full-year students.

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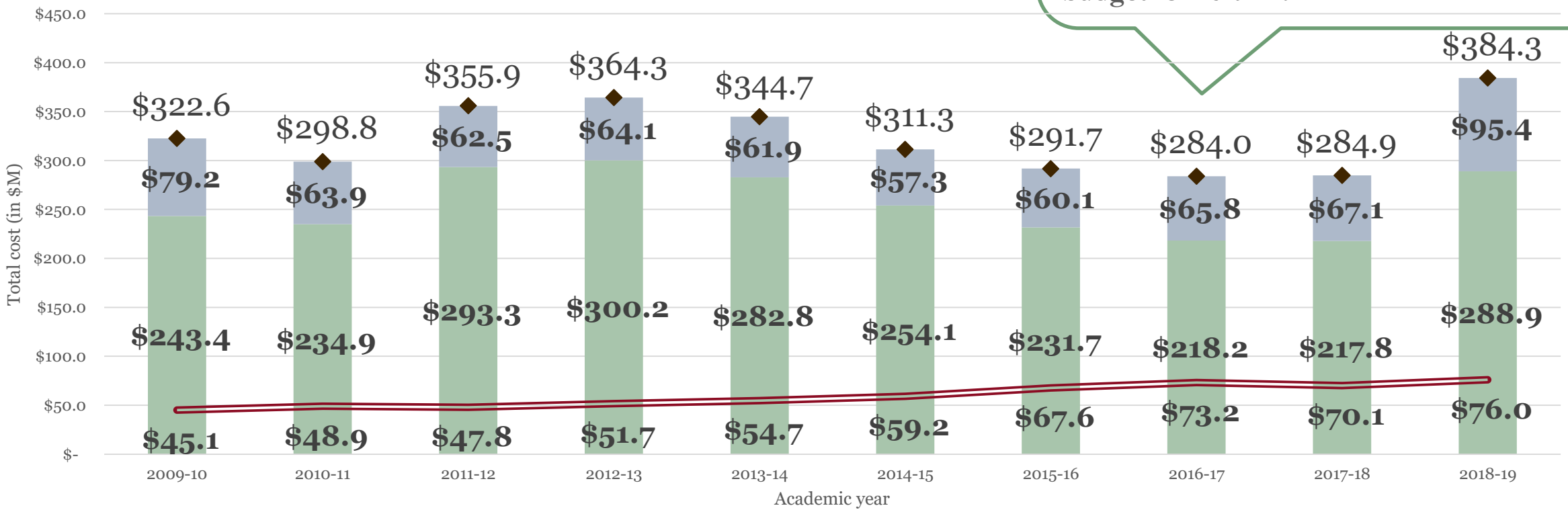
Coverage Gap & Cost to Close

To have awarded **ALL** students last year with a financial need (at the current award level), you'd need an additional $300 million. **Total estimated costs using SRM would be approx. $730 million above current OOG budget for 2019-21.**

Yearly total estimated costs vs. actual budget (in millions of dollars)



Cost of awarding all FAFSA/ORSAA filers with financial aid need between Federal Pell Grant EFC and the total COA

Estimated cost of awarding OOG to all FAFSA/ORSAA filers who are Federal Pell Grant-eligible (using historical yearly average dollars disbursed for public university students each academic year)

Yearly budget (actual biennial budget, 48% spent in year 1, 52% in year 2)

◆ Cost of awarding all FAFSA/ORSAA filers with financial aid need

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CONCLUSION

Takeaways

Conclusions

- OOG promotes student success and shifts funds toward the lowest-income students
- Propels students out of poverty
- Brings federal dollars into the state
- Promotes higher education attainment, in accordance with 40-40-20 goal

Recommendations

- Provide more funding
- Consider funding models, like higher award levels that close the affordability gap
  - Differentiated Award Amount Model (State of Washington)
  - Shared Responsibility Model

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OREGON OPPORTUNITY GRANT: 2020 REPORT

Office of Student Access and Completion

Juan Baez-Arevalo, Director
Susan Degen, Grants Manager
Erin Pischke, Research Analyst

DECEMBER 12, 2019

HIGHER EDUCATION COORDINATING COMMISSION

OREGON OPPORTUNITY GRANT:
Annual Evaluation, 2020

This report was prepared by Erin C. Pischke and Susan Degen of the Oregon Higher Education Coordinating Commission's Office of Student Access and Completion. February 2020.

PREFACE

The Oregon Opportunity Grant (OOG) is Oregon's largest state-funded, need-based grant program for college students. From its inception in 1971, the program has undergone many changes in how it awards funds, the amount of funds awarded and who is awarded funds. Most recently, House Bill 2407 (2015) clarified how the Higher Education Coordinating Commission's (HECC) Office of Student Access and Completion (OSAC) should prioritize grant awards if funds are not sufficient to serve to all qualified students.

HB 2407 requires prioritizing Oregon Opportunity Grant funds for qualified students with the greatest financial need. To understand the OOG's impact toward achieving this goal, OSAC and the HECC's Office of Research and Data worked with stakeholders—including public and private non-profit postsecondary colleges and universities, other state agencies and related education-related organizations—to analyze ten years of data (covering academic years 2009-10 to 2018-19) to determine the impact of the 2015 policy change on undergraduate students with the highest financial need.

Another provision of HB 2407 requires the HECC to produce an evaluative report of the OOG to the Legislature in February 2020 and every year thereafter. This first annual report presents findings from the HECC's analysis of the effects of 2015 policy changes on undergraduate students with the highest financial need.

As the single state entity responsible for ensuring pathways to higher educational success for Oregonians statewide, the HECC sets state policy and funding strategies, administers numerous programs and over $1.4 billion annually of public funding and convenes partners working across the public and private higher education arena to achieve state goals. More information about the HECC can be found at www.oregon.gov/highered and about the student financial support programs it administers at www.oregonstudentaid.gov. Questions about the HECC should be directed to info.HECC@state.or.us, and questions about this report should be directed to Juan Báez-Arévalo, the Director of the Office of Student Access and Completion, Oregon Higher Education Coordinating Commission, juan.baez-arevalo@hecc.oregon.gov, 541-687-7307.

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EXECUTIVE SUMMARY

BACKGROUND

Established in 1971, the Oregon Opportunity Grant (OOG) is Oregon's largest state-funded, need-sensitive grant program designed to help Oregon students afford a postsecondary education. The Higher Education Coordinating Commission's (HECC) Office of Student Access and Completion (OSAC) administers the grant. Oregon students apply for the Oregon Opportunity Grant simply by completing the Free Application for Federal Student Aid (FAFSA), which is also the application for federal Pell Grants and Federal Direct Loans or the Oregon Student Aid Application (ORSAA); there is no separate application. The ORSAA is the State-approved alternative to the FAFSA for undocumented Oregon students, including those who have Deferred Action for Childhood Arrivals (DACA) status or Temporary Protected Status (TPS) and are not eligible to participate in federal financial aid programs.

Each year, OSAC processes FAFSA/ORSAA forms for more than 200,000 potentially OOG-eligible undergraduate students. Of those, between 30,000 and 40,000 students receive OOG funds each academic year. Oregon Opportunity Grants are available to eligible Oregonian undergraduate students for the equivalent of up to four years (12 quarters or 8 semesters) of full-time enrollment and are prorated for partial-year or half-time enrollment. Students must reapply each year by submitting a FAFSA or ORSAA.

House Bill 2407, enacted in 2015, prioritized awarding of OOG funds to qualified students with the greatest financial need (i.e., those whose expected family contribution is at or below $3,500). The legislative changes in HB 2407 required the HECC/OSAC to produce an evaluative report of the Oregon Opportunity Grant to the Legislature in February 2020 and every year thereafter. This report presents findings from the HECC's analysis of the 2015 policy change on undergraduate students with the highest financial need.

SUMMARY OF FINDINGS

The policy change implemented in 2015 positively affected the academic success of undergraduate students who received the Oregon Opportunity Grant award, including those students with the highest financial need. OOG recipients, a majority of whom are low-income students, achieve academic success despite facing myriad challenges. While this trend was found throughout the time period analyzed for this report, the largest shift in OOG awards and funds toward the lowest-income students occurred after 2015.

Findings from this report indicate that the 2015 policy change's most potentially significant impact was shifting OOG awards and funds away from the highest-income to the lowest-income recipients. The focus on providing OOG awards to students with the highest financial need accomplishes the goals outlined in the equity guidelines published by the HECC.[1]

Overall, OOG recipients' outcomes at Oregon's postsecondary institutions are positive. While the 2015 policy change had no impact on race and ethnicity, gender, age or the first-generation status of students, retention rates for OOG recipients are equal to or better than non-recipients statewide for the year analyzed.

[1] The HECC is committed to improving the postsecondary success of students who have been historically underserved, including students of color, English-language learners, economically disadvantaged students, LGBTQ students and students with disabilities. Moreover, increasing access to postsecondary education and training is critical, but so too is increasing the success rates of learners who are enrolled (see https://www.oregon.gov/highered/about/Pages/mission-vision-values.aspx).

OOG recipients have similar completion outcomes at community colleges and public universities, where they graduate at similar or better rates than their non-recipient peers (no independent private non-profit institutional data is available at this time).

It is clear that the Oregon Opportunity Grant is worth the State's investment. Investing in the OOG not only increases student success, improves the State's chances of meeting its 40-40-20 goal and increases the amount of federal dollars flowing into the State, but also leads to a better-educated workforce and improved state economy.

CONCLUSIONS AND RECOMMENDATIONS

Given significant increases in the cost of attending college or university over the past decade and the relatively flat funding for the OOG, OOG awards do not provide the same purchasing power as they did ten years ago. Moreover, funding limitations have meant that the grant is not available to thousands of students who demonstrate significant financial need. Funding for the OOG should be increased in order to provide a realistic promise of college affordability for Oregon's low- and middle-income students. **The State could expand the OOG in one or more of the following ways:**

Ensure that all students with demonstrated financial need gain access to the OOG. Awarding an average-sized OOG award to all students whose college costs surpass what they and their family could reasonably be expected to contribute (e.g., their EFC) would have required an additional $308.3 million investment from the State in 2018-19, when compared to actual 2018-19 funding levels. As cost of attendance continues to increase at Oregon universities and colleges, there is a need to award more students, especially those with higher financial need in the low- and middle-income ranges. The overall cost of OOG awards under the SRM could be up to $429.3M for one year, or approximately $893M for a biennium – approximately $730M above the current OOG budget of $164.2M for 2019-21.

Ensure that today's highest-need students—those currently eligible for the OOG—receive a large enough award to fully cover their college costs. Even with the OOG focused solely on the state's highest-need, lowest-income students, funding limitations have forced the program to severely restrict the size of those awards. High-need students should receive a large enough award to support students' access to enrollment, retention and completion of a postsecondary degree. Increasing the purchasing power of the OOG, for example, by ensuring that it fully covered unmet need for low-income students and kept pace with rising costs, would help alleviate the financial burden on students.

Make changes to the award structure to close the affordability gap. Creating a differentiated award amount, where the award amounts increase relative to the financial need of the students (i.e., the students with the most need receive the largest awards) would help close the affordability gap in higher education. The OOG's purchasing power has decreased over time as the cost of attendance and tuition and fees rise. With a differentiated award amount, similar to Oregon's Shared Responsibility Model (SRM) or Washington State's model, the State could give meaningful awards to students to help them meet the full cost of attendance.

There is a guaranteed return on investment that the State makes toward students' OOG awards. An increase in OOG funding directly increases the flow of federal Pell Grant dollars into the state. Any investment the State makes also incentivizes federal Pell Grant-eligible FAFSA filers, as well as ORSAA filers, to matriculate and stay enrolled in college. With state funding, students' are encouraged to enroll in school and their success is supported. Recently, the lack of state investment in the OOG has led to unclaimed federal Pell Grant dollars, which also can lead to missed opportunities for students to achieve a postsecondary degree.

ACKNOWLEDGEMENTS

This report would not have been possible without the support and feedback from the HECC's Office of Student Access and Completion's staff, including Director Juan Báez-Arévalo, Jordi Humphreys, Michelle Lovejoy, Kyra King and Gavin Holdgreiwe. Our colleagues at the HECC's Office of Research and Data, Amy G. Cox, Elizabeth Martinez, Shiyan Tao, Betsy Simpkins, Olga Levadnaya and Vern Mayfield, gave their time and energy to this report; we appreciate them and their insights, which greatly improved the final product. This report would be incomplete without the work of the many Institutional Research and Financial Aid staff at independent private non-profit institutions who diligently gathered and aggregated institutional data; we are grateful for their support. We also appreciate the continued willingness of staff at Oregon's universities and community colleges, who work closely with the HECC staff to implement the OOG program.

ABBREVIATIONS

EFC - Expected Family Contribution

FAFSA - Free Application for Federal Student Aid

HECC - Higher Education Coordinating Commission

OOG - Oregon Opportunity Grant

ORSAA - Oregon Student Aid Application

OSAC - Office of Student Access and Completion

SRM - Shared Responsibility Model

INTRODUCTION

What is the Oregon Opportunity Grant (OOG)?

The Oregon Opportunity Grant (OOG) is Oregon's largest state-funded, need-based grant program for college students. From its inception in 1971, the program has undergone many changes in how it awards funds, the amount of funds awarded and who is awarded funds. Most recently, House Bill 2407 (2015) clarified how the Higher Education Coordinating Commission's (HECC) Office of Student Access and Completion (OSAC) should prioritize grant awards if funds are not sufficient to serve to all qualified students.

A key provision of HB 2407 requires prioritizing Opportunity Grant funds for qualified students with the greatest financial need. To understand the OOG's impact toward achieving this goal, OSAC and the HECC's Office of Research and Data worked with stakeholders—including public and private non-profit postsecondary colleges and universities, other state agencies and related education-related organizations—to analyze ten years of data (covering academic years 2009-10 to 2018-19) to determine the impact of the 2015 policy change on undergraduate students with the highest financial need.

What is the purpose of the report?

The legislative changes in HB 2407 required the HECC to produce an evaluative report of the Oregon Opportunity Grant to the Legislature in February 2020 and every year thereafter. This first annual report presents findings from the HECC's analysis of the 2015 policy change on undergraduate students with the highest financial need (i.e., those whose expected family contribution is at or below $3,500).

What questions will the report be answering?

The report will be asking and answering the following questions:

1. How did the need-based policy change established by legislation in 2015 and first implemented in 2016-17 affect the academic success of undergraduate students with the highest financial need?
2. What would it cost to fully serve all Oregonians with an Oregon Opportunity Grant?

SUMMARY OF FINDINGS

The policy change implemented in 2015 positively affected the academic success of undergraduate students who received the Oregon Opportunity Grant award, including those students with the highest financial need. OOG recipients, a majority of whom are low-income students, achieve academic success despite facing myriad challenges. While this trend was found throughout the time period analyzed for this report, the largest shift in OOG awards and funds toward the lowest-income students occurred after 2015.

Findings from this report indicate that the 2015 policy change's most potentially significant impact was shifting OOG awards and funds away from the highest-income to the lowest-income recipients.

The focus on providing OOG awards to students with the highest financial need accomplishes the goals outlined in the equity guidelines published by the HECC.[2]

Overall, OOG recipients' outcomes at Oregon's postsecondary institutions are positive. While the 2015 policy change had no impact on race and ethnicity, gender, age or the first-generation status of students, retention rates for OOG recipients are equal to or better than non-recipients statewide for the year analyzed. OOG recipients have similar completion outcomes at community colleges and public universities, where they graduate at similar or better rates than their non-recipient peers (no independent private non-profit institutional data is available at this time).

It is clear that the Oregon Opportunity Grant is worth the State's investment. Investing in the OOG not only increases student success, improves the State's chances of meeting its 40-40-20 goal and increases the amount of federal dollars flowing into the State, but also leads to a better-educated workforce and improved state economy.

BACKGROUND

Established in 1971, the Oregon Opportunity Grant (OOG) is Oregon's largest state-funded, need-sensitive grant program designed to help Oregon students afford a postsecondary education. The Higher Education Coordinating Commission's (HECC) Office of Student Access and Completion (OSAC) administers the grant. Oregon students apply for the Oregon Opportunity Grant simply by completing the Free Application for Federal Student Aid (FAFSA), which is also the application for federal Pell Grants and Federal Direct Loans or the Oregon Student Aid Application (ORSAA); there is no separate application. The ORSAA is the State-approved alternative to the FAFSA for undocumented Oregon students, including those who have Deferred Action for Childhood Arrivals (DACA) status or Temporary Protected Status (TPS) and are not eligible to participate in federal financial aid programs.

Each year, OSAC processes FAFSA/ORSAA forms for more than 200,000 potentially OOG-eligible undergraduate students. Of those, between 30,000 and 40,000 students receive OOG funds each academic year. Over the years, OSAC's processes for determining students' eligibility for the OOG and calculating eligible students' annual award amounts have evolved to accommodate changes in funding levels, legislative priorities and higher education policies. What follows is a brief overview of the OOG program's eligibility criteria.

Basic Oregon Opportunity Grant Eligibility Criteria

Oregon Opportunity Grants are available to eligible students for the equivalent of up to four years (12 quarters or 8 semesters) at full-time enrollment and are prorated for partial-year or half-time enrollment. Students must reapply each year by submitting a FAFSA or ORSAA. General eligibility requirements are as follows (from https://oregonstudentaid.gov/oog-eligibility-awarding.aspx):

- Be an undergraduate student (no prior bachelor's degree).
- Be a U.S. citizen or eligible noncitizen. Be an Oregon resident for at least 12 months prior to the period of enrollment (exceptions made for some dependent students and out-of-state members of

[2] The HECC is committed to improving the postsecondary success of students who have been historically underserved, including students of color, English-language learners, economically disadvantaged students, LGBTQ students and students with disabilities. Moreover, increasing access to postsecondary education and training is critical, but so too is increasing the success rates of learners who are enrolled (see https://www.oregon.gov/highered/about/Pages/mission-vision-values.aspx).

Native American tribes with traditional ties to Oregon). Undocumented students, including students with DACA status, may be eligible if they meet certain additional requirements.

- Be enrolled at last half time (6 credit-hours/term or more) in the fall term.
- Attend a participating Oregon postsecondary institution (participates in federal Title IV programs and is a public or private non-profit institution located and headquartered in Oregon).
- Have financial need, based on the difference between cost of attendance, federal aid and financial resources of the student and the student's family, if applicable.

Other Conditions of Award:

- Maintain satisfactory academic progress, as determined by the student's school.
- Have no defaults on federal student loans nor owe refunds of federal student grants.
- Meet all federal Title IV eligibility requirements regarding Selective Service registration and drug-selling convictions.

Other Current Policies:

- Must be enrolled at least half time fall term (quarter/semester) to maintain grant eligibility for the year, unless OSAC approves a fall enrollment waiver. Students who have an authorized award but are enrolled less than half time in fall or who wait until winter or spring to attend lose their grant eligibility for the year. The only exceptions are for students who are not able to attend fall term due to circumstances beyond their control.
- To be eligible for a guaranteed second-year award, students must meet all existing requirements, be a first-time recipient, be enrolled at least half time all three terms and have submitted a FAFSA/ORSAA for the upcoming year by May 1.
- Students must submit a new FAFSA or ORSAA for each academic year they plan to attend college or university.
- Students enrolled in courses of study leading to degrees in theology, divinity or religious education are not eligible.

2019-20 Award Information

Award Priorities: Oregon Opportunity Grant funds are awarded first to students with the greatest financial need. OSAC uses the federally calculated EFC to determine financial need and awards grants based on students' EFCs, starting with EFCs of $0. OSAC will increase the EFC cutoff and continue to make awards until funds are exhausted. Because available funds may vary year to year, OSAC cannot specify far in advance an exact EFC cutoff or final deadline for receiving a grant. Even if students received the OOG in prior years and filed the FAFSA early, they may not receive a grant if their EFC is higher than the annual limit for the current academic year.

Award Amount: Maximum award amounts for 2019-20 are $2,700 for students attending a community college and $3,300 for students attending a public university or Oregon-based independent private non-profit institution. To receive the maximum award amount for 2019-20, students must be enrolled full time for the full year at an eligible Oregon-based postsecondary institution. The current EFC limit for the 2019-20 academic year is $3,500.

Delivery of Funds to Students: OSAC releases a portion of the annual award to the student's school at the start of each academic term (quarter or semester). The student's school then releases funds to the student's

account, based upon the student's enrollment status for the term (full or half time). Historical and yearly OOG assumptions and awarding criteria are included in Appendix A.

DATA

This report uses data from submitted Free Application for Federal Student Aid (FAFSA) and the Oregon Student Aid Application (ORSAA)[3] for Oregonians for each year within the time period examined in this report (2009 through 2019). All demographic and financial data included in the FAFSA/ORSAA are self-reported by the students. Enrollment, completion and OOG award data come from student records at each institution. The community colleges and public universities submit those records to the HECC, which calculates enrollment, retention and completion measures. Private institution data are calculated by each participating institution, which then submits aggregate measures to the HECC. The findings reported here are based on information about students enrolled in the State's seven public four-year universities (and Oregon Health & Science University [OHSU], which used to be part of the Oregon University System), 17 public two-year community colleges, and 15 private universities[4]. Student- and institution-level data was aggregated for each variable.

Throughout the report, we use the most recent year of data available at the time of writing. For measures relying on student enrollment and completion data, this is 2017-18 for the community colleges and public universities. For measures relying on FAFSA/ORSAA data, 2018-19 is the most recent year data were available. Findings that include all "eligibles" or all "applicants" (e.g. people who filed the FAFSA/ORSAA and had financial need) does not reflect the reality of the students who choose not to attend college at all, those who go out of state to obtain higher education or those who did not use an OOG award they were eligible for and offered. The percentage of total eligible applicants who attend an Oregon college or university and accept and use an OOG award fluctuates year to year. Where applicable in this report, we make note of the percentage of students who attend and use OOG awards.

Throughout the report, data about non-recipients who are Oregon residents include many students who would never have been eligible for the grant because their EFC would have been higher than a yearly cutoff limit, when applicable. Definitions of variables reported on in this report are included in Appendix B and notes on the limitations and gaps in the private non-profit universities' data are included in Appendix C.

This report is descriptive in nature; therefore, variables examined may be related to one another or impacted by external, unrelated forces. Causal relationships among variables have not been explored.

[3] ORSAA filers included in data after 2016.

[4] Western Seminary's students are not included in the data or findings because they do not have undergraduates who are eligible to receive the OOG. In addition, two non-profit schools that used to participate in OOG have closed in the past two years (Marylhurst University and Oregon College of Art and Craft) and another (University of Western States) discontinued its undergraduate program.

STUDENT FINDINGS

The policy change implemented in 2015 positively affected the academic success of undergraduate students who received the Oregon Opportunity Grant award, including those students with the highest financial need. OOG recipients, a majority of whom are low-income students, achieve academic success despite facing myriad challenges. While this trend was found throughout the time period analyzed for this report, the shift in OOG awards and funds toward the lowest-income students occurred after 2015.

The focus on providing OOG awards to students with the highest financial need accomplishes the goals outlined in the equity guidelines published by the HECC.[5]

DEMOGRAPHIC CHANGES

Race and ethnicity: Between 2009-10 and 2018-19, the proportion of OOG recipients who were Hispanic/Latinx or identified as two or more races/ethnicities grew, while the share of recipients who were White, Black, Asian American, Native American or Alaskan Native and Native American or Pacific Islander declined within the same time period. These trends predated the 2015 OOG policy change and appeared unaffected by them, indicating that those changes had no effect on the race or ethnicity of OOG recipients.

Gender: Female students make up a greater share of the OOG recipient and non-recipient student populations compared to male students in the years 2009-10, 2015-16 and 2017-18. However, since there were no major differences between OOG recipient and non-recipient populations, findings do not indicate that the 2015 policy change had an effect on the gender of OOG recipients. See Appendix E for OOG recipients' and non-recipients' gender through time.

Age: Among OOG recipients, there were more students in the 18-24 age group compared to others in most years analyzed for this report (the exception is in 2009-10, when there were roughly equal numbers of students in the 18-24 and 25+ age groups). The next-largest share of OOG recipients was the group of students who were 25-years-old or older. More non-recipients were in the 25+ age group than the 18-to-24-year-olds' age group. The difference between older adult students and younger students who did not receive an OOG award shrank over time, possibly because more adults returned to receive a postsecondary degree during the Great Recession (2009-10, 2010-11), which increased that age group's population during those years. Over time, the age of non-recipients in the 18-24 age group remained steady. The 17-and-under age group and students for whom their age was unknown made up smaller shares of the OOG recipients' and non-recipients' populations over time. Similar to trends in findings for gender and race/ethinicity, findings do not indicate that the 2015 policy changes had an effect on the age of OOG recipients. See Appendix F for OOG recipients' and non-recipients' age through time.

First-generation status: There are slightly more students who were first-generation college students than non-first-generation students in the OOG-recipient student population from 2010-11 until 2014-15. For example, there were 9,532 first-generation students and 9,273 non-first-generation students in the 2011-12 academic year. In 2015-16 the trend reversed, with a slightly larger number of non-first-generation students than first-generation. There were 13,849 first-generation students and 14,269 non-first -generation students in

[5] The HECC is committed to improving the postsecondary success of students who have been historically underserved, including students of color, English-language learners, economically disadvantaged students, LGBTQ students and students with disabilities. Moreover, increasing access to postsecondary education and training is critical, but so too is increasing the success rates of learners who are enrolled (see https://www.oregon.gov/highered/about/Pages/mission-vision-values.aspx).

the 2015-16 academic year, a trend that continued through 2018-19. In 2018-19, there was a larger difference between first- and non-first-generation students compared to other years, with 2,993 first-generation students and only 6,295 non-first generation students.

In the non-recipient population, the majority of students were not first-generation college-goers. Similar to the OOG recipient's trends, the proportion of first-generation and non-first-generation students in the non-recipient population remained steady through the time period analyzed for this report, with a difference of approximately 61 percentage points between the two populations. This indicates that the 2015 policy change did not have a major impact on first-generation students' college-going rates in these sectors. See Appendix G for OOG recipients' and non-recipients' first-generation status.

INCOME LEVELS OF RECIPIENTS: BEFORE AND AFTER 2015 POLICY CHANGE

Table 1 shows that, over time, the number of OOG recipients with the lowest income levels has risen (those with income below $20,000), a trend that accelerated after 2015. The share of OOG recipients in the $0 to $19,999 income-level range has wavered from 56% of the total recipients in 2014-15 to 53% in 2015-16 and grew to 60% in 2016-17. The number of recipients in the low-middle-income-level range ($20,000 to $49,999) grew from 33% to 36% of the total in 2014-15, but declined to 33% in 2016-17. The share of OOG recipients with the highest income levels (those with $50,000 and more in income) was steady in 2014-15 and 2015-16, but decreased to 8% of the total number of recipients in 2016-17.

TABLE 1. OOG RECIPIENT COUNTS AND PROPORTIONS BY INCOME LEVELS AND ACADEMIC YEAR (PERCENT OF YEARLY TOTALS SHOWN).

Income Range	**2014-15**	**2015-16**	**2016-17**
Under $20,000	20,248	21,005	24,453
$20,000 – 49,999	11,902	14,052	13,279
Over $50,000	3,928	4,287	3,142
Grand Total	36,078	39,344	40,874

Income Range	**2014-15**	**2015-16**	**2016-17**
Under $20,000	56.12%	53.39%	59.83%
$20,000 – 49,999	32.99%	35.72%	32.49%
Over $50,000	10.89%	10.90%	7.69%

Table 2 shows that, over time, the majority of OOG award disbursements flowed to students with the lowest income levels ($0 to $19,999). This trend was true before and after the policy change. Despite the decline in the number of recipients in the low-middle-income-level range (e.g., $20,000 to $49,999) from 2015-16 to 2016-17, the low-middle-income OOG recipients received about a third of OOG award dollars, which increased slightly, from 34% in 2015-15 to 37% in 2016-17. The most dramatic change in OOG disbursements was seen in the highest-income group, which received about 12% of all OOG award dollars in 2014-15, but only 5% in 2016-17.

TABLE 2. OOG TOTAL DOLLARS DISBURSED AND PERCENTAGES BY INCOME LEVELS AND ACADEMIC YEAR

Income Range	2014-15	2015-16	2016-17
Under $20,000	$30,869,024	$33,529,961	$40,673,259
$20,000 – 49,999	$19,630,609	$23,107,706	$25,278,449
Over $50,000	$6,804,672	$7,686,793	$3,187,866
Grand Total	$57,304,305	$64,324,460	$69,139,574

Income Range	2014-15	2015-16	2016-17
Under $20,000	53.87%	52.13%	58.83%
$20,000 – 49,999	34.26%	35.92%	36.56%
Over $50,000	11.87%	11.95%	4.61%

These changes in awarding trends indicate that the 2015 policy change shifted OOG awards and funds away from the highest-income to the lowest-income recipients. Before 2015, the first-come, first-served nature of the awarding process allowed students with adjusted gross incomes under $70,000 who filed a FAFSA early to receive an OOG award. The effect was that the funds were not directed toward the neediest students. Furthermore, the students with high financial need who did not file a FAFSA early enough did not receive an award. After the policy change, which prioritized students with the most financial need, more OOG awards and funds were received by low-middle- and low-income students (although all had EFCs at or below $3,500). Analysis of more years of data is needed to fully understand the impacts of the 2015 policy change.

STUDENT OUTCOMES

Retention rates: First-year, first-time OOG recipients are more likely to stay enrolled at community colleges and private universities than their non-recipient peers. For the 2016-17 academic year, the fall-to-fall term retention rates for first-time OOG recipients were higher for independent private non-profit institutions and community colleges when compared to non-recipients' rates. Since there were no data available from academic years besides 2016-17, it is too early to say whether the 2015 policy change impacted retention rates.

There were no major changes between OOG recipient and non-recipient transfer populations' retention rates at the independent private non-profit institutions (the only sector for which we have data at this time) through time. Findings do not indicate that the 2015 policy change had an effect on the retention rate of first-time OOG recipient transfer students after 2015 in this sector. However, the percentage-point differences between OOG recipient and non-recipient transfer populations' retention rates overall indicate that the grant may be helping to incentivize students' return to school after their first year of receiving the grant.

Completion rates: Completion rates for the public sector schools indicate that OOG recipients—and therefore lower-income students—complete at slightly higher rates than non-recipient, resident students at community colleges (50% compared to 47.1%, respectively). At public universities, OOG recipients do just as well as non-recipients in terms of completing their degree programs (approximately 65% for both groups).

RETENTION RATES

For the 2016-17 academic year—the most recent year with data available from all three sectors—the fall-to-fall term/semester retention rate for first-time OOG recipients statewide was 82% and 77% for non-recipients. Retention rates for OOG recipients were approximately nine percentage points higher for independent private non-profit institutions and community colleges when compared to non-recipients' rates (82% compared to 73%, respectively). At public universities[6], the retention rate for non-recipients (86%) was higher than that of independent private non-profit institutions[7] and community colleges[8] (73% and 74%, respectively) (see Figure 1). Retention rates included here are for all resident students across the three sectors. Since there were no data available from academic years besides 2016-17, we cannot say whether the 2015 policy changes impacted retention rates of all resident students across the three sectors.

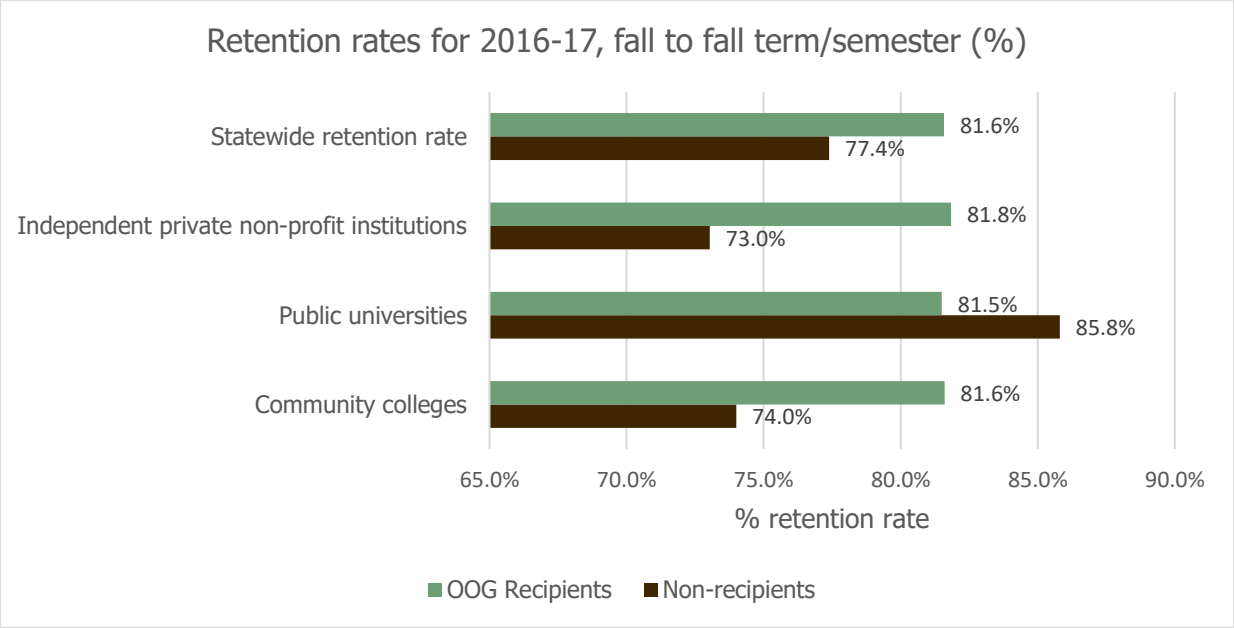

FIGURE 1. RETENTION RATES FOR 2016-17 STUDENT COHORT, FALL TO FALL TERM/SEMESTER, BY OOG AWARD STATUS (%)[9]

Retention rates do not include students who received their first OOG award after their first year and do not include information about enrollment status (e.g., full-time, half-time, less-than-half-time enrollment), which would provide a better understanding of these students. Further, more recent cohorts have had fewer terms

[6] For public university students, retention rate is the percentage of first-time, full-time freshmen in fall 2016 who enrolled in fall 2017.
[7] For independent private non-profit institutions, retention rate is the first year to second year, fall-to-fall retention; the count of degree-/credential-seeking students enrolled in the fall of the prior year who are still enrolled in the fall of the following year. The retention rate for these schools may be slightly inflated due to discrepancies in how these values were calculated.
[8] For community college students, retention rate is the percentage of new, credential-seeking students in fall 2016 who were enrolled in fall 2017. This includes students who were new to the institution in summer or fall 2016, not enrolled in dual-credit courses after the spring of 2016 (a proxy for high school graduates), and earned at least 18 quarter credits or earned an award requiring fewer than 18 credits by the end of two years (the Voluntary Framework of Accountability [VFA] degree-seeking cohort).
[9] Data for universities includes new first-time, full-time freshmen who meet the custom definition of Oregon resident for OOG purposes.

of enrollment and therefore fewer opportunities to be eligible for the grant. As they are enrolled more terms, the numbers of students who ever received an OOG award changes, which changes the retention rate.

Transfer students' retention rates are calculated using the first-year-to-second-year, fall-to-fall retention of transfer degree/credential-seeking students (who have received an OOG award or not) who were enrolled at least half-time (i.e., at least 6 credit hours) in the fall of the prior year and are still enrolled at least half-time in the fall of the current year.

At the independent private non-profit institutions throughout the ten academic-year periods analyzed, the retention rate for transfer students who were first-time OOG recipients was higher than that of non-recipient transfer students. The average percentage-point difference between OOG and non-recipient transfer students was 11 points; the largest percentage-point gap was 17 points in 2012-13 and the smallest was four percentages points in 2010-11 (see Appendix C).[10]

Since there were no major changes between OOG recipient and non-recipient transfer populations' retention rates at the independent private non-profit institutions through time, findings do not indicate that the 2015 policy change had an effect on the retention rate of first-time OOG recipient transfer students after 2015. However, the percentage-point differences between OOG recipient and non-recipient transfer populations' retention rates overall indicate that the grant may be helping to incentivize students' return to school after their first year of receiving the grant.

COMPLETION RATES

Community college completion rates show the percentage of students who earned an associate degree or career certificate or who transferred to any four-year university nationwide. This includes students who were new to the institution in fall 2013, were not enrolled in dual credit/accelerated learning, and earned at least 18 quarter credits over two years or earned an award requiring fewer than 18 credits. This cohort reflects the degree-seeking cohort of the Voluntary Framework of Accountability (VFA) but with four-year outcomes. Public university completion rates show the percentage of first-time, full-time freshmen in the fall 2012 cohort who earn a bachelor's degree within six years at any of the public universities. The completion rates we are able to report on for the public-sector schools indicate that OOG recipients—and therefore lower-income students—complete at slightly higher rates than non-recipient, resident students at community colleges (50% compared to 47.1%, respectively). At public universities, OOG recipients do just as well as non-recipients in terms of completing their degree programs (approximately 65% for both groups) (see Figure 2).

University completion data for OOG recipients for 2018-19 will not be available until January 2020. The HECC will be collecting and reporting completion rate data from independent private non-profit institutions starting next year. Three-year outcomes for community college students (the equivalent of the 6-year bachelor's degree outcomes for first-time, full-time freshmen at the universities) are not shown because so few of those students attend full-time, or even close to full-time. We use four-year outcomes to account for the fact that the vast majority attend part-time.

[10] The University of Western States did not have transfer students to report on. Their OOG students were in a one-year program that did not accept transfer students. Conversely, the National University of Natural Medicine only had transfer students to report on; they did not have first-year degree-earning students.

HB2407 (2015) was first effective for the 2016-17 academic year. It is too early to evaluate the policy change's impact on completion rates. Not enough years have passed to allow the HECC to evaluate how completion rates have changed pre- and post-2015 since completion rates typically span six years for any given cohort. In this report we focus on year-to-year retention rates. Requiring the first report to be submitted by February 1, 2020 means the HECC can report preliminary completions only on students at two-year schools who were first enrolled in 2016-17. The completion data on the cohort of students at four-year schools who were first enrolled in 2016-17 will not be available to analyze until the end of the 2019-2020 academic year at the earliest.

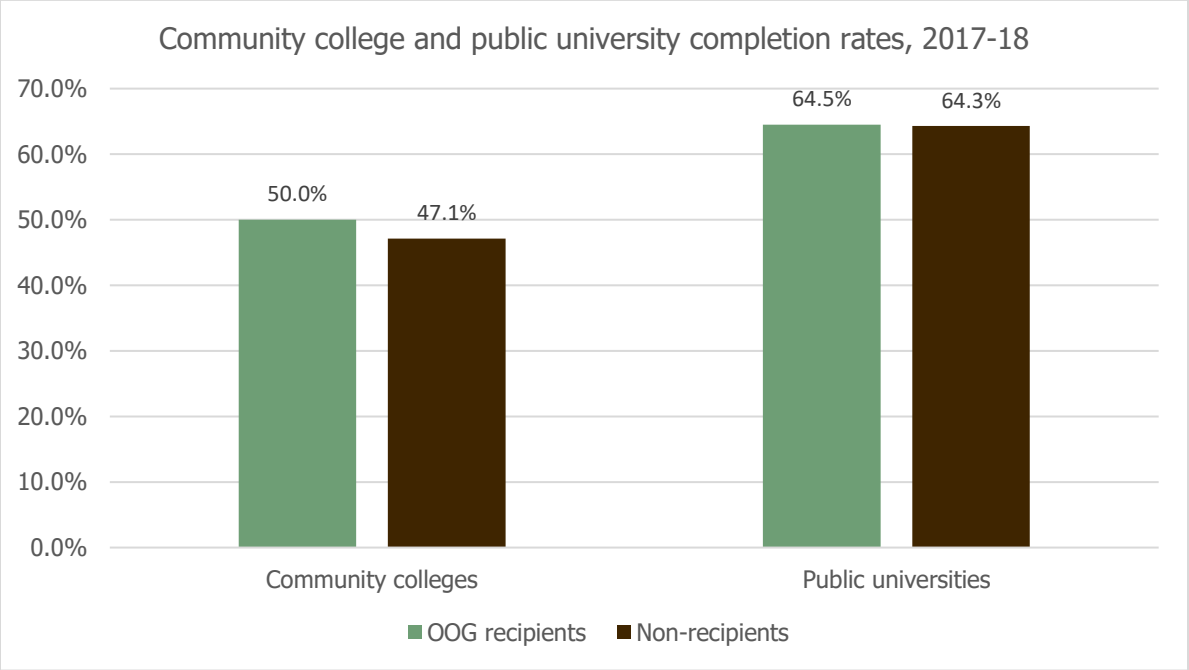

FIGURE 2. COMPLETION RATES FOR OOG RECIPIENTS AND NON-RECIPIENTS AT PUBLIC UNIVERSITIES IN THE 2017-2018 ACADEMIC YEAR.

FUNDING ANALYSIS OF OOG

Pre-2015 legislative change award structure: Shared Responsibility Model (2008-09 to 2015-16)

In 2007, the Oregon Legislature passed Senate Bill 334 (2007), bringing about major changes in the methodology OSAC used to determine OOG eligibility and award amounts. The bill's provisions were based on recommendations from the State Board of Higher Education's Access and Affordability Working Group (AAWG), which was first convened in March 2004 and reconvened starting in December 2005. The AAWG's key recommendations included increasing OOG funding and using a shared responsibility framework and financial modeling to restructure the OOG. As envisioned, the Shared Responsibility Model (SRM) was to reflect a shared partnership among students, their families, the federal government and the State in the way the State awarded OOG funds to students. The SRM had broad support from AAWG members, the State Board of Higher Education and other education partners as a way to make higher education affordable for all Oregonians and increase educational attainment statewide. The intent, as noted in promotional materials, was so, "Even students with no resources will be able to 'work their way through college' again, as generations of students did before them."

The preamble to Senate Bill 334 established several guidelines for changes to the OOG program: do no harm to current OOG recipients in using a new methodology to calculate grants; give highest priority to students with the greatest financial need; expand the number of recipients to reach more families in the low-middle income range; and eliminate an application cutoff date. The statutory change eliminated a definition of financial need that had served as the primary basis for OOG awarding for many years.

The SRM-based formula for calculating Opportunity Grant awards consisted of five main components—average annual cost of education, student share, family share, federal share and state share. OSAC used the following formula to calculate each student's award:

Average Cost of Education (for public two-year/four-year institutions)
minus - Student share
minus - Family share (EFC)
minus - Federal share (federal Pell Grant and/or assumed tax credit)
equals = Remaining need
minus - Prorata reduction (if needed)
equals = State share (Opportunity Grant award), up to annual award maximum

Using student budget data collected from all participating institutions, OSAC calculates the *average cost of education* for a typical student enrolled full time for the full year (at 15 credits per term) for each type of participating institution (i.e., tuition and fees; books and supplies; room and board; transportation; and miscellaneous personal expenses). To determine a student's OOG award amount, the SRM formula in OSAC's Financial Aid Management System subtracted other components from the average cost of attendance for the two public sectors. The *student share* is a fixed amount all students were expected to contribute toward the cost of their education, usually from a combination of savings, scholarships, work, borrowing and other resources. This fixed amount was based on a formula using assumed earnings from a part-time job at Oregon minimum wage and, for students at 4-year schools, a fixed amount of borrowed money ($3,000/year). The *family share* is equal to the student's federally calculated EFC. The EFC calculation uses financial information reported on the FAFSA and serves as an indicator of the student's and/or family's

ability to contribute to the student's educational costs. The *federal share* consists of the sum of the student's federal Pell Grant award and/or assumed federal tax credits (based on the adjusted gross income of an independent student and spouse or that of a dependent student's parents).

Due to major increases in funding and the SRM awarding methodology, more grant aid became available to more students during 2008-09, the first year under the SRM. However, the start of the Great Recession and slow economic recovery in subsequent years drove many more students back to college than the State had ever anticipated, resulting in overwhelming increases in demand for Oregon Opportunity Grants at the same time that the State began to reduce all agency budgets in response to lower tax revenues. OSAC responded to limited funding and increased demand for OOG funds by implementing cost control measures, including early application deadlines, reduced award amounts and limits on program eligibility.

Post-2015 legislative change award structure: Focus on Financial Need and Cost of Attendance (2016-17 to present)

The current awarding strategy for Opportunity Grants is based upon provisions of House Bill 2407 (2015), which clarify how OSAC is to prioritize grant awards if funds are not sufficient to serve to all qualified students. OSAC implemented most provisions in 2016-17:

- Establish a maximum award amount for the grant based on a student's enrollment status (full time or half time).
- Establish procedures that prioritize awarding of Oregon Opportunity Grants to qualified students with the greatest financial need.
- Guarantee a second-year grant award for those who follow specified renewal guidelines.
- Award grants to those whose circumstances would enhance the promotion of equity guidelines published by the HECC.

OSAC now prioritizes awarding of OOG funds based upon each student's demonstrated financial need, as indicated by a student's federally calculated EFC. OSAC has used an EFC limit of $3,500 since 2017-18, slightly lower than the $4,000 EFC limit used in 2016-17. OSAC continues to authorize OOG awards, using a combination of EFC limits and application dates, until projections indicate that funds have been exhausted for the academic year.

HB 2407 leaves OSAC's previous award formula (based on the Shared Responsibility Model) and structures in place, but the underlying formula does not come into play because of the current emphasis on prioritizing awards based on financial need. In fact, OSAC cannot award all applicants who meet the current EFC limit of $3,500, let alone all who are eligible for federal Pell Grants, which have a higher EFC limit. Insufficient funding also prevents OSAC from implementing a provision that permits OSAC to reward student persistence and encourage completion of degrees at postsecondary institutions by awarding grants in amounts not limited by the maximum OOG award amount.

Award Amounts Based on Cost of Attendance: In 2018-19, OSAC staff implemented a two-tier award system that aligns with a percentage of prior-year COA, replacing the flat awards that had been in place during the Great Recession years. Maximum award amounts had been a flat $2,250 for all students in both 2016-17 and 2017-18, but OSAC increased maximums to $2,600 for community college students and $3,200 for students at public and private four-year colleges and universities – approximately 13% of prior-year costs. This change addresses the higher COA at the public universities and independent private non-profit institutions and is preferable to retaining grants at a lower amount but extending them to more students. The

earlier flat $2,250 award amount had covered no more than 11% of COA, so students were still unable to afford school costs even if they qualified. Inadequate funding for the OOG can lead students on a pathway to high college debt. Further, some students were still unable to attend even if they qualified. Inadequate funding for the OOG can start students on a pathway to high college debt. Further, if those students cannot complete their education due to the high cost of attendance, they also lack the incomes that allow them to pay off that debt.

The OOG program currently serves approximately 30,000 to 40,000 students each year, but only those students who have the highest need – i.e., EFCs of $3,500 or less. Even those with EFCs of up to $5,486 (the EFC limit for 2018-19 OOG awards), however, are eligible for modest federal Pell Grants.

AFFORDABILITY OF HIGHER EDUCATION

Individuals do not agree on a single definition of "affordable higher education." One approach is to consider whether a person can afford to attend college/university without having to incur debt. To do so, a student (and/or their families) would need to be able to cover all higher education expenses up to the cost of attendance. For some, this means submitting a FAFSA/ORSAA and "applying" for federal grants, such as the federal Pell Grant and state grants, such as the OOG. Through this process, the federal government provides students and their families with an EFC, a measure of a student's or family's financial strength and ability to pay a portion of the student's college costs. If their EFC is at or higher than the cost of attendance, they are expected to be able to afford the cost of higher education. A family with a higher EFC is not eligible for need-based financial aid, such as federal Pell Grants or the OOG (starting in 2016 when the OOG awarding process included an EFC limit). For students and families with lower EFCs, some might be eligible for federal and state grants, but these sources of funding can only ensure that higher education is affordable if they make up any difference between the cost of attendance and their EFC. Further, since those who receive federal Pell Grants and OOG awards also have the lowest EFCs, even after applying a student's/family's EFC amount and federal, state and other scholarship or grant awards, there is still a gap between what a student/family can afford to pay and the full cost of attendance.

OVERALL CHANGES

Observations of applicant counts are specific to the years covered by this initial report, but some trends are reminiscent of application trends in years past. Using student budget data collected from all participating institutions, OSAC calculates the average cost of education for a typical student enrolled full time for the full year (at 15 credits per term) for each type of participating institution, including tuition and fees; books and supplies; room and board; transportation; and miscellaneous personal expenses.[11]

The COA for higher education continues to increase every year, as it has since 2009-10, the first year for which the analysis of OOG data was completed for this report. In fact, an ever-increasing COA has been a chronic problem throughout the entire history of financial aid. The largest percentage increase (seven percentage points) was from 2009-10 to 2010-11 (the middle of the Great Recession), followed by the next-largest increase of 4% from 2015-16 to 2016-17. These observations are specific to the years covered by this initial report but often existed for many years in the past. (The state saw similar, though smaller, increases in the number of FAFSA filers during previous recessions.)

Figure 3 shows the number of all FAFSA filers, the proportion who were eligible for a federal Pell Grant (although not all of them receive one) and those who had financial need up to the average COA for public universities. The number of FAFSA filers from the previous year increased from 2009-10 through 2011-12 until it began declining. The number of filers decreased each academic year until it made a slight increase in 2017-18. The largest single year of increased FAFSA filers was in 2009-10 (the number of filers rose 26% from the previous year), whereas the largest percentage change of -10% was in 2015-16. The primary reason for the increase was the Great Recession, when many working adults lost jobs and went back to school,

[11] Although OHSU does not have many undergraduate students, these students are considered for OOG awards, just as for students from other public institutions. OHSU's costs are so different from costs for other sectors that they have an adverse effect on overall averages, so their costs are not included when calculating statewide averages. Their students are limited to taking nine credits per term in some cases, but tuition and fees are higher. Moreover, their nontuition costs can be higher because they have to purchase special insurance for some specialized degree tracks.

leading to ever-increasing demand for financial aid and shrinking state budgets and mid-biennium budget cuts. This led to a shockingly small number of recipients in 2010-11, which were slightly supplemented with public university funds. State funding levels did not start to recover until the 2013-15 biennium. Since 2013-14, FAFSA/ORSAA counts have decreased each year as working adults found jobs (see Figure 3).

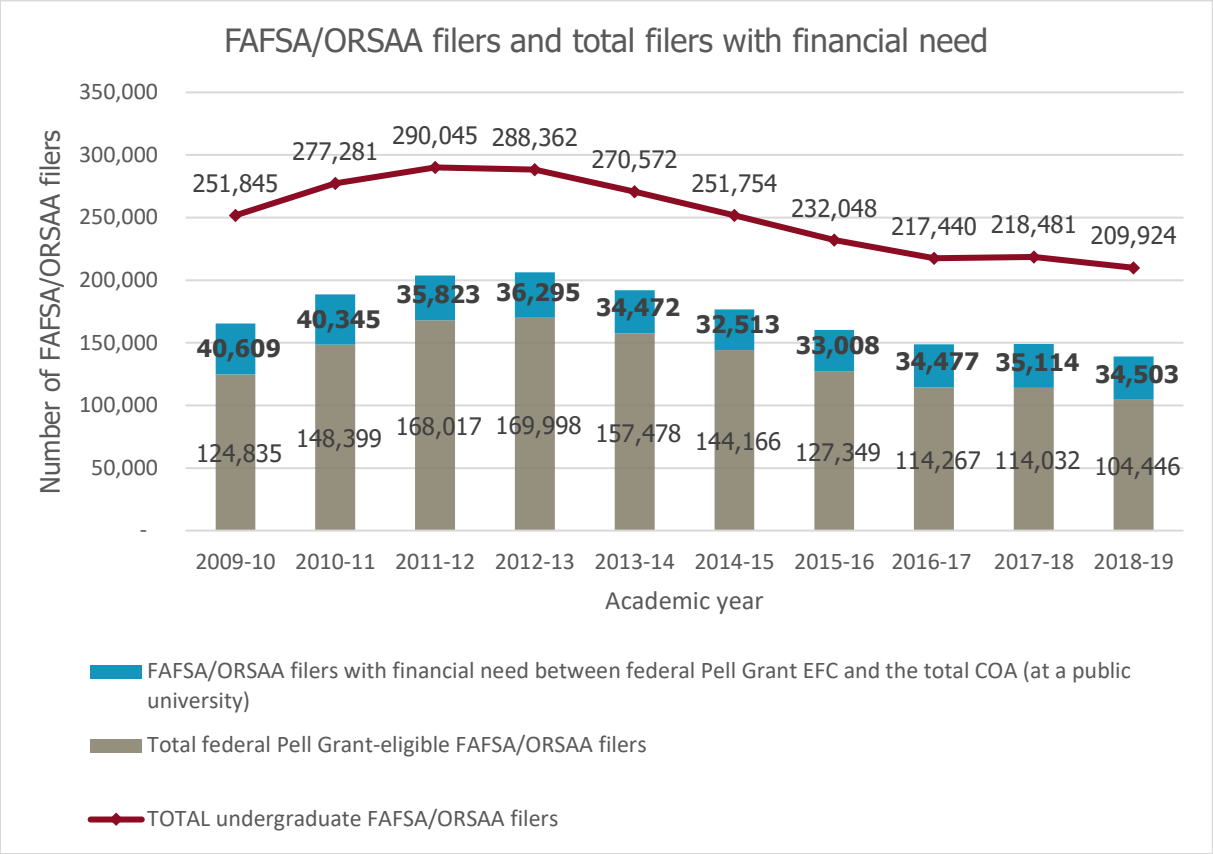

FIGURE 3. TOTAL NUMBER OF OREGONIAN FAFSA/ORSAA FILERS, AND TOTAL FILERS WITH FINANCIAL NEED (WITH PELL GRANT-ELIGIBLE EFCS AND NON-ELIGIBLE EFCS) FROM 2009-10 TO 2018-19.

In the same 10-year period, the majority of all individuals who filed a FAFSA/ORSAA were eligible for a federal Pell Grant and had financial need (see Table 3). These students might have been eligible for a federal Pell Grant and an OOG award, but since neither of those awards' purchasing powers have kept pace with the full cost of attendance, the students would have had some additional financial need up to the cost of attendance. In order to make up the difference between what they could afford to pay and the full cost of attendance, they would have needed to find alternative sources of funds, such as loans or other institutional financial aid.

TABLE 3. PERCENTAGE OF FAFSA/ORSAA FILERS WITH FINANCIAL NEED WHO WERE FEDERAL PELL GRANT-ELIGIBLE PER ACADEMIC YEAR, 2009-10 TO 2018-19.

Academic Year	Percent of FAFSA/ORSAA filers with financial need who are federal Pell Grant-eligible
2009-10	75%
2010-11	78%
2011-12	82%
2012-13	82%
2013-14	82%
2014-15	81%
2015-16	79%
2016-17	76%
2017-18	76%
2018-19	75%

There is a guaranteed return on investment that the State gets when it provides students with students' OOG awards. An increase in OOG funding directly increases the flow of federal Pell Grant dollars into the state. Any investment the State makes incentivizes federal Pell Grant-eligible students to matriculate and stay enrolled in college, while also leveraging federal funds.[12] With state funding, students' are encouraged to enroll in school and their success is supported. Recently, a lack of state investment in the OOG has led to unclaimed federal Pell Grant dollars, which also can lead to missed opportunities for students to achieve a postsecondary degree.

AFFORDABILITY GAPS AND DEMAND FOR OOG

The percentage of individuals with financial need (up to the yearly average public university COA amount) of all undergraduate FAFSA/ORSAA filers has steadily increased year to year by a larger percentage than the previous year since 2009-10. The OOG serves a small proportion of the total number of all undergraduate FAFSA/ORSAA filers with financial need (from 4% to 19% over the last decade) (see Figure 4).

Statutory changes made in 2007 as part of the implementation of the Shared Responsibility Model require annual state grant award amounts for students at independent private non-profit institutions to be equal to or less than the award amounts granted at public universities, despite the private universities' higher costs.

[12] See Denning, J. T., Marx, B. M., & Turner, L. J. (2019). ProPelled: The effects of grants on graduation, earnings, and welfare. American Economic Journal: Applied Economics, 11(3), 193-224.

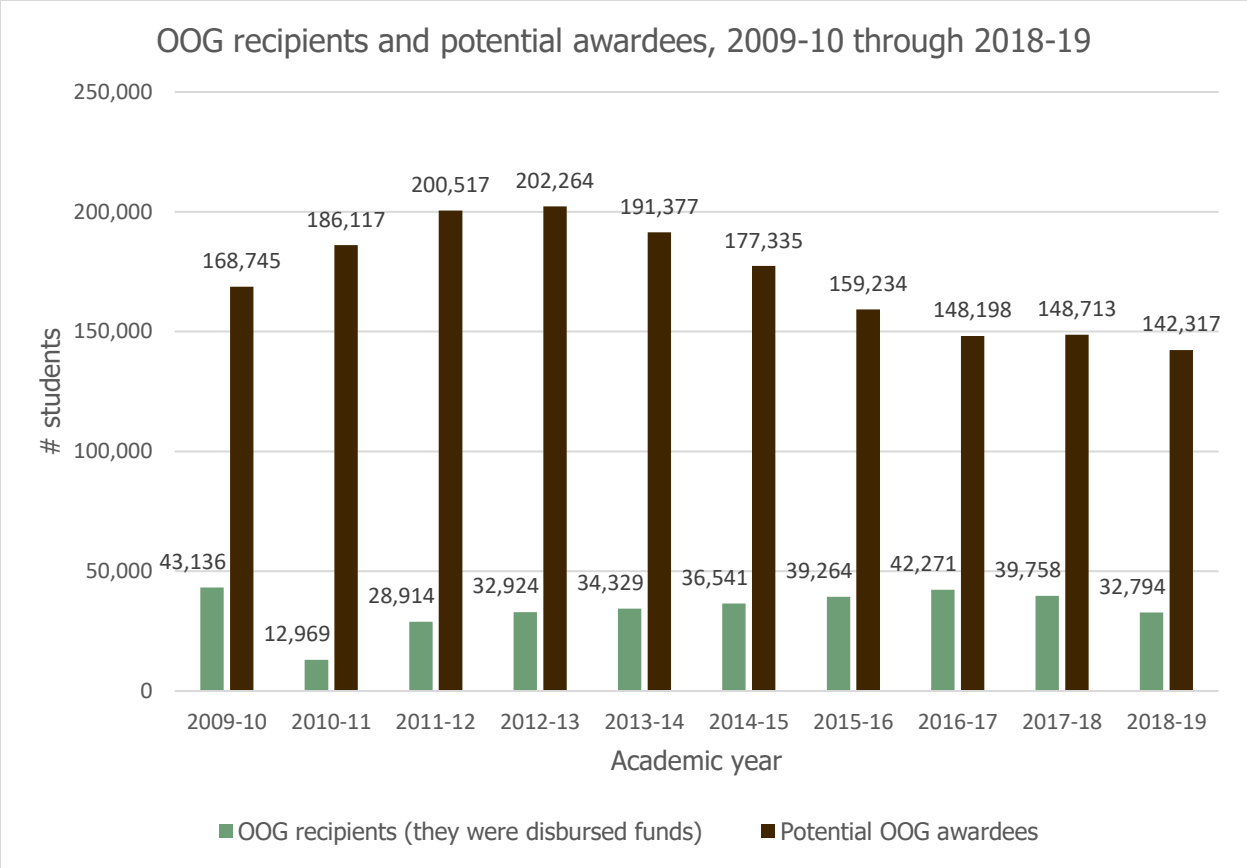

FIGURE 4. NUMBER OF OOG RECIPIENTS AND FAFSA/ORSAA FILERS, 2009-10 THROUGH 2018-19.[13]

Due to funding constraints, the number of students who might have been eligible for an OOG award was much greater than the number of students who actually received an award. In order to control costs and equitably serve the students with the greatest financial need, OSAC considered a student's income level, their EFC or the date they filed the FAFSA/ORSAA and awarded those who met the cutoff criteria each year. Furthermore, not every applicant who might have been eligible for an OOG award attended an eligible Oregon school, resulting in fewer students receiving the award than the number who met eligibility criteria.

RANGE OF STUDENTS WITH FINANCIAL NEED

Figure 5 shows the current and recent "affordability" gap, where the full cost of attendance is increasing more than federal and state financial aid awards in the past decade. As higher-education costs increased, federal Pell Grant and OOG amounts have remained flat, pushing postsecondary attainment farther out of reach for students who have financial need at or below the cost of attendance. Costs in Figure 5 are relative to four-year university average yearly costs of attendance, the yearly maximum federal Pell Grant amounts for full-time, full-year students and the average OOG award amounts for all sectors pertaining to the authorized award amounts for actual award recipients in each year.

[13] Potential OOG awardees refers to Oregonians who attend an eligible Oregon college or university as an undergraduate student and have at least one term of OOG eligibility remaining. Their exact level of financial need is not represented in the figure.

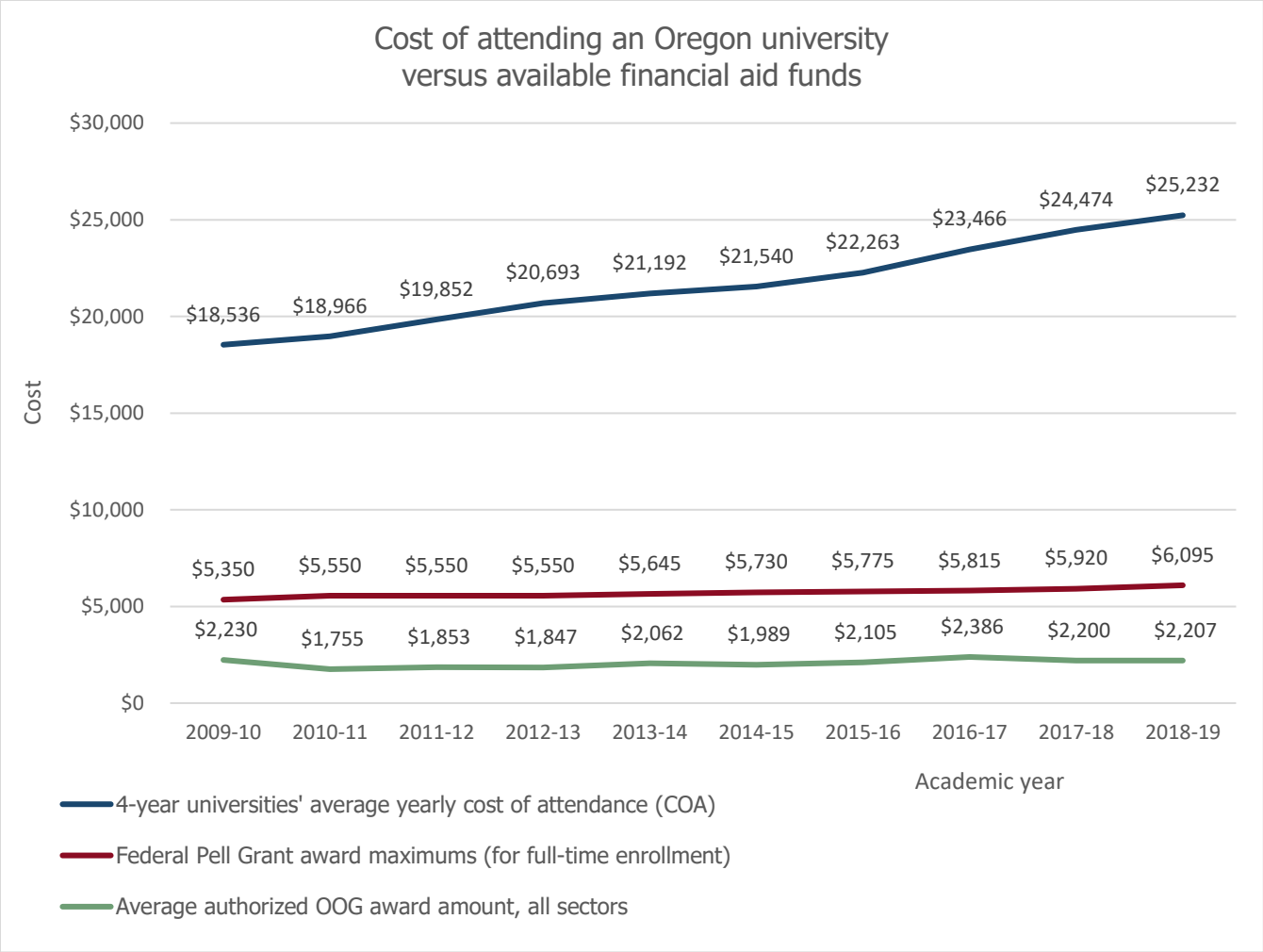

FIGURE 5. AVERAGE COA FOR AN OREGON PUBLIC UNIVERSITY COMPARED TO THE FEDERAL PELL GRANT AWARD MAXIMUM AND TO THE AVERAGE OOG AWARD AMOUNT FROM 2009-10 TO 2018-19.

When considering the rising cost of higher education, it is important to take note of the costs that make up the total cost of attendance. The formula used to determine COA is equal to the annual average tuition and fees for public universities (excluding OHSU) plus the average nontuition costs across all schools (community colleges, public universities and independent private non-profit institutions). Nontuition costs include books and supplies, room and board, transportation and miscellaneous living expenses. As Figure 6 shows, the proportion of COA that is made up by tuition and fees is largest at independent private non-profit institutions (between 68-70% in the past decade), followed by public universities (36%-40%) and community colleges (23% to 27%). This value can fluctuate depending on whether a student lives on campus or off, the types of materials and textbooks they may need for the credential or degree they are pursuing, as well as the school's location (rural or urban). Although much attention is paid to the rising costs of tuition, as Figure 6 makes clear, often nontuition costs constitute a greater proportion of the COA.

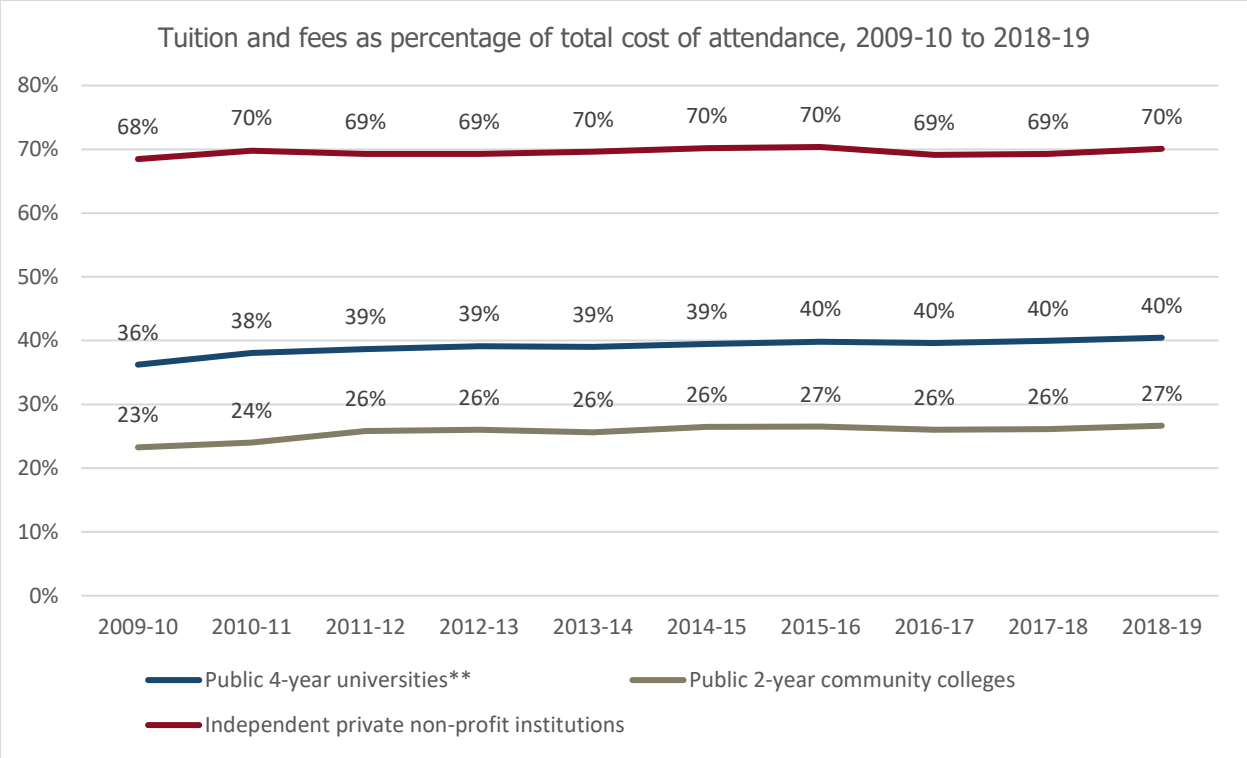

FIGURE 6. TUITION AND FEES BY SECTOR AS A PERCENT OF TOTAL COA, 2009-10 TO 2018-19.

Table 4 compares average Oregon costs of higher education14—the listed average cost of attendance and average tuition and fees in each school sector for a full-time, full-year student—at the beginning of the time period studied for this report (2009-10) and costs of the same ten years later (2018-19). Using student budget data collected from all participating institutions, OSAC calculates the average cost of education—tuition and fees; books and supplies; room and board; transportation; and miscellaneous personal expenses—for a typical student enrolled full time, full year (at 15 credits per term) for each type of institution.[14] Over the 10 year period from 2009-10 to 2018-19, the cost of education increased 33% at community colleges, 36% at public universities and 34% at independent private non-profit institutions.

Table 4 also shows colleges' and universities' average tuition and fees (a portion of the total cost of attendance) in each sector for a full-time, full-year student. In the past decade, tuition and fees increased 52% at community colleges and public universities, while independent private non-profit institutions increased 37%. However, tuition and fees represent only a fraction of the total cost of education. As Figure 6 shows, community college's and public universities' tuition and fees make up less than half of the total cost of attendance.

[14] The average cost of attendance used in this report aligns with state statute; it uses public-sector university averages of tuition & fees plus average nontuition across all sectors (excluding OHSU).

TABLE 4. LISTED AVERAGE COA AND TUITION AND FEES (T&F) BY SECTOR FOR 2009-10 AND 2018-19.

	Community colleges		Public universities		Independent private non-profit institutions	
	Average full COA	Average T&F	Average full COA	Average T&F	Average full COA	Average T&F
2009-10	$15,404	$3,584	$18,536	$6,716	$37,486	$25,666
2018-19	$20,485	$5,461	$25,232	$10,208	$50,219	$35,195
Percentage increase	33%	52%	36%	52%	34%	37%

PURCHASING POWER OF OOG

The tuition and fees and nontuition costs of higher education are only two factors to consider related to affordability. Students' federal and state financial aid increased more slowly, with the federal Pell Grant and the OOG only partially offsetting the costs of higher education. From 2009-10 to 2018-19, the maximum federal Pell Grant amount for full-time, full-year students only increased 14%.

The maximum OOG award amount did not increase at all for the community college sector and increased 20% for the public and private institutions, when comparing the two reference years used here, 2009-10 and 2018-19 (see Table 5). It is important to note that within the past decade, the award amount and procedure changed toward prioritizing the lowest-income students (for whom the award amount may be more meaningful), due to the Great Recession, limited funding and the inability of the State to fund and implement the SRM. Since the maximum OOG award amount for community college students remained at $2,600 in the years at either end of the time period analyzed here (i.e., in 2009-10 and 2018-19),[15] the OOG purchasing power, or the amount of cost of attendance that the award covered after federal financial aid is applied, declined. The OOG's purchasing power declined from 26%, 20% and 8% at community colleges, public universities and independent private non-profit institutions, respectively, to 18%, 17% and 7% (see Table 7). It also declined relative to tuition and fees.

In the tables that follow, the purchasing power of the OOG in relation to the average cost of attendance after the federal Pell Grant amount is applied (see Table 6) is provided to show how affordable—or not—higher education in Oregon has been during the past decade. The values shown demonstrate the impact of financial aid on COA by sector (for full-time, full-year students who receive a federal Pell Grant). Table 7 represents the purchasing power of OOG awards for those full-time, full-year students who receive the maximum federal Pell Grant amount. It is important to note students' ability to use OOG awards and the federal Pell Grant to pay for nontuition costs. While OOG may not be needed to cover tuition and fees at a community college, students with high financial need still need the combination of OOG and Pell to help cover the full cost of attendance. The table does not demonstrate the purchasing power of the OOG for students who may

[15] The community college award amount dropped to $1,800 in 2010-11 and only gradually increased back to $2,600 in 2018-19. The 4-year university award amount dropped to $1,950 in 2010-11 and gradually increased back to $3,200 last year. During the years from 2012-13 to 2017-18, OOG awards were the same for all sectors. Costs actually increase as OOG awards were either decreased or stalled out with minimal increases.

be enrolled half time, less than half time and other students who might not have been eligible for the OOG because they were taking too few credits or were enrolled less than half time. They still have challenges in being able to pay for college; it is not affordable for them either.

TABLE 5. MAXIMUM OOG AWARDS BY SECTOR FOR FULL-TIME, FULL-YEAR STUDENTS FOR 2009-10 AND 2018-19.

	Community colleges	Public universities	Independent private non-profit institutions
2009-10	$2,600	$2,675	$2,675
2018-19	$2,600	$3,200	$3,200
Percentage increase	0%	20%	20%

In 2009-10, the first year this report focused on, award amounts were restricted—they should have been increased each year—due to the Great Recession, limited state funds and the inability to fund and implement the SRM. In 2018-19, the OOG maximum award amounts for community colleges are the same dollar amount as they were ten years ago. The difference between 2009-10 and 2018-19 awards is that the amounts a decade ago had a stronger purchasing power compared to now.

TABLE 6. AVERAGE COA, AFTER FEDERAL PELL GRANT APPLIED, BY SECTOR FOR 2009-10 AND 2018-19.

	Community colleges	Public universities	Independent private non-profit institutions
2009-10	$10,054	$13,186	$32,136
2018-19	$14,390	$19,137	$44,124

TABLE 7. PURCHASING POWER OF OOG AWARD BY SECTOR (OF REMAINING COA AFTER A MAXIMUM PELL AWARD, THE PERCENT COVERED BY OOG) FOR 2009-10 AND 2018-19.

	Community colleges	Public universities	Independent private non-profit institutions
2009-10	26%	20%	8%
2018-19	18%	17%	7%

The weak purchasing power of the federal Pell Grant and OOG awards has not been able to bolster middle- and low-income students' ability to afford the full cost of attendance at many colleges or universities. An EFC that is about equal to the COA for a four-year public university ($25,232 in 2018-19) represents an average income of more than $150,000, well above Oregon's 2019 median family income of $63,400.[16] Students and their families must find a way to cover any remaining cost, after federal, state and institutional financial aid is applied (e.g., their "financial need"), which often means borrowing money and rendering higher education

[16] See https://www.oregon.gov/das/oea/pages/forecastecorev.aspx

unaffordable. Since the purchasing power of financial aid awards has declined in recent years and the cost of attendance has increased, affordable higher education has gotten farther out of reach for many students.

If the purchasing power of the OOG had remained steady from 2009-10 to 2018-19, the current award amount would need to be $3,741 for community college students and $3,827 at public universities and independent private non-profit institutions in order for the OOG to have the same effect on the full COA as it did a decade ago. However, even if the grant had been indexed to increases in COA, it would still fall well short of covering the financial needs of many students.

There is a widening affordability gap for the middle-income students who are not eligible for federal Pell Grants or the OOG. Since the EFC limits for OOG ($3,500) are currently lower than they are for the federal Pell Grant ($5,486), it would be unlikely for students who do not receive the federal Pell Grant to ever be eligible for the OOG.[17] They may have $0 in OOG purchasing power. They do not have federal or state grant funds to help defray the costs of higher education, so the COA for these students is the price they are expected to pay or borrow money in order to afford. See Table 8 for a summary of OOG's purchasing power relative to the cost of attendance in each school sector.

TABLE 8. SECTOR BREAKDOWN OF AVERAGE TUITION AND FEES (T&F), AVERAGE COST OF ATTENDANCE (COA), AVERAGE COA AFTER PELL AND REMAINING COA COVERED BY OOG.

Community colleges	**Average T&F**	**Average full COA**	**Average COA, after max Pell**	**Max OOG award**	**Purchase Power of OOG**
2009-2010	$3,584	$15,404	$10,054	$2,600	26%
2018-2019	$5,461	$20,485	$14,390	$2,600	18%

Public universities	**Average T&F**	**Average full COA**	**Average COA, after max Pell**	**Max OOG award**	**Purchase Power of OOG**
2009-2010	$6,716	$18,536	$13,186	$2,675	20%
2018-2019	$10,208	$25,232	$19,137	$3,200	17%

Independent private non-profit institutions	**Average T&F**	**Average full COA**	**Average COA, after max Pell**	**Max OOG award**	**Purchase Power of OOG**
2009-2010	$25,666	$37,486	$32,136	$2,675	8%
2018-2019	$35,195	$50,219	$44,124	$3,200	7%

[17] The exception is for low-income ORSAA filers, who might not be eligible for federal Pell Grants, but able to receive an OOG award.

AWARDING LIMITATIONS OVER THE YEARS

A maximum OOG award amount that is indexed to increases in COA (or tuition and fees) to keep the OOG purchasing power at the same level as in 2009-10 is desirable. However, there much greater need for more funding in order to serve all Oregonians who have financial need (i.e., those who have an EFC below the average annual COA). Figure 7 shows the estimated *additional* cost of awarding OOG to all students who were federal Pell Grant-eligible in each year using historical *yearly average dollars disbursed* for public university students each academic year. It also shows the additional estimated cost of awarding all students with financial need between federal Pell Grant EFC limits and the average cost of attendance at a four-year public university, using current OOG award amounts. The estimated investment shown in Figure 7 is for funding 100% of FAFSA/ORSAA filers with financial need at or below the COA. Not every viable applicant will attend an eligible Oregon school or accept and use an OOG award. Actual costs would vary depending on the actual number of students who attend and accept and use the award.

The values at the top of the graph shows the sum of the costs of awarding both of those groups of students (i.e., all FAFSA/ORSAA filers with financial need at or below the average COA at a public university). Despite the great need for financial aid, the biennial budget for the OOG program (the line at the bottom of the graph) falls short of being able to give an average OOG award to all eligible FAFSA/ORSAA filers. If all eligible students were to be awarded the average OOG award (the actual amount of dollars disbursed to public university students) in any given year, a substantial investment by the State would have been needed. These cost estimates do not take into consideration the by-sector breakdown of students in any given year who attend a community college—who receive smaller award amounts—and those who attend a four-year school. They also do not reflect the exact number of students who would attend full time for a full year and receive the maximum award amount; for this reason, the average amount of dollars disbursed in each year is used.

The estimated cost of awarding an average OOG amount (i.e., $2,766 average dollars disbursed for public university students in 2018-19) to all FAFSA/ORSAA filers with financial need would have been $384.3 million (an additional $308.3 million investment from the State, when compared to actual funding levels) in 2018-19. In any given year, however, the number of students who are offered an award and accept it varies. The rate at which awards are used is called the "pick-up rate"; pick-up rates vary based on award amount (higher award amounts lead to higher pick-up rates), academic sector and the actual number of applicants who enroll at least half time at an eligible Oregon college or university.

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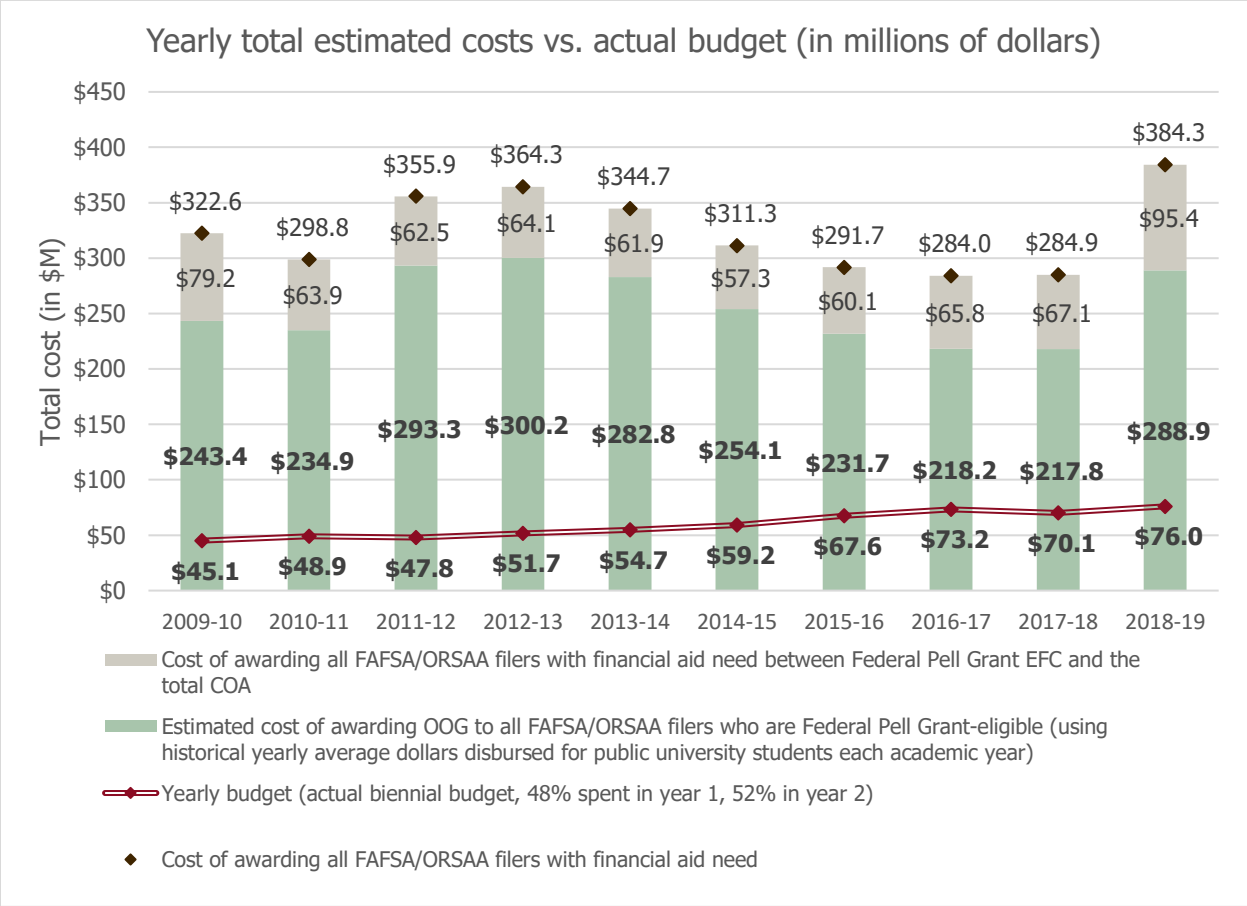

FIGURE 7. ESTIMATED ANNUAL COSTS (IN MILLIONS OF DOLLARS) OF DIFFERENT AWARDING LEVELS (ALL FEDERAL PELL GRANT-ELIGIBLE FAFSA/ORSAA FILERS, ALL STUDENTS BETWEEN PELL AND COA AND COMBINED TOTAL) COMPARED TO ACTUAL BUDGET AT CURRENT AWARD LEVELS FROM 2009 TO 2019.

The Shared Responsibility Model (SRM) was used to determine OOG award amounts from 2008-09 through 2015-16, but the program's budget was never came close to fully funding awards under the SRM. If the OOG were fully funded under the SRM for one year, award amounts would increase significantly, from the current maximum awards of $2,600 for community college students who have a $0 EFC to $7,490. Current $3,200 maximum awards for students with a $0 EFC at a public university or independent private nonprofit institution would increase to $9,200. In addition, the SRM also allowed for awards that covered full remaining need down to a minimum award of $400, for students with EFCs of between $12,000 and $13,000. Such minimum awards are not currently available, given the current statutory focus on prioritizing awards based on highest financial need. With higher awards, more students would be likely to attend and take advantage of the OOG program. Assuming high pick-up rates of nearly 80% for students at four-year institutions and 57.5% at community colleges, the overall cost of OOG awards under the SRM could be up to $429.3M for one year, or approximately $893M for a biennium – approximately $730M above the current OOG budget of $164.2M for 2019-21.

To estimate the amount of funding needed, the total number of actual FAFSA/ORSAA filers for 2018-19 and 2019-20 was used. The SRM projection model includes a combination of two- and four-year public pickup rates, includes a tax credit, attendance adjustments (i.e., the percentage of students at full-year enrollment), as well as full-time and half-time ratios. Award maximums in the model were set at $30,000 (to allow for a range of financial need) and a minimum award of $400.

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CONCLUSION

FUTURE RESEARCH

With access to more data and stronger collaborative relationships with institutional partners, the HECC will be able to report on a wider range of topics related to the success of OOG recipients.

SUMMARY OF FINDINGS

The policy change implemented in 2015 positively affected the academic success of undergraduate students who received the Oregon Opportunity Grant award, including those students with the highest financial need. OOG recipients, a majority of whom are low-income students, achieve academic success despite facing myriad challenges. While this trend was found throughout the time period analyzed for this report, the largest shift in OOG awards and funds toward the lowest-income students occurred after 2015.

Findings from this report indicate that the 2015 policy change's most potentially significant impact was shifting OOG awards and funds away from the highest-income to the lowest-income recipients. The focus on providing OOG awards to students with the highest financial need accomplishes the goals outlined in the equity guidelines published by the HECC.[18]

Overall, OOG recipients' outcomes at Oregon's postsecondary institutions are positive. While the 2015 policy change had no impact on race and ethnicity, gender, age or the first-generation status of students, retention rates for OOG recipients are equal to or better than non-recipients statewide for the year analyzed. OOG recipients have similar completion outcomes at community colleges and public universities, where they graduate at similar or better rates than their non-recipient peers (no independent private non-profit institutional data is available at this time).

It is clear that the Oregon Opportunity Grant is worth the State's investment. Investing in the OOG not only increases student success, improves the State's chances of meeting its 40-40-20 goal and increases the amount of federal dollars flowing into the State, but also leads to a better-educated workforce and improved state economy.

RECOMMENDATIONS

From 2009-10 to 2018-19, the maximum federal Pell Grant amount for full-time, full-year students only increased 14%. The federal Pell Grant and the OOG only partially offset the costs of higher education. The maximum OOG award amount did not increase at all for the community college sector and increased 20% for the public and private institutions. It is important to note that within the past decade, the award amount and procedure changed, prioritizing the lowest-income students, for whom the award amount may be more meaningful, in more recent years.

[18] The HECC is committed to improving the postsecondary success of students who have been historically underserved, including students of color, English-language learners, economically disadvantaged students, LGBTQ students and students with disabilities. Moreover, increasing access to postsecondary education and training is critical, but so too is increasing the success rates of learners who are enrolled (see https://www.oregon.gov/highered/about/Pages/mission-vision-values.aspx).

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It is important to note students' ability to use OOG awards and the Federal Pell Grant to pay for nontuition costs. While OOG may not be needed to cover tuition and fees at a community college for students who receive a maximum federal Pell Grant (e.g., $0 EFC), students with high financial need still need the combination of OOG awards and federal Pell Grants to help cover the full cost of attendance.

Given significant increases in the cost of attending college or university over the past decade and the relatively flat funding for the OOG, OOG awards do not provide the same purchasing power as they did ten years ago. Moreover, funding limitations have meant that the grant is not available to thousands of students who demonstrate significant financial need. Funding for the OOG should be increased in order to provide a realistic promise of college affordability for Oregon's low- and middle-income students. **The State could expand the OOG in one or more of the following ways:**

> **Ensure that all students with demonstrated financial need gain access to the OOG.** Awarding an average-sized OOG award to all students whose college costs surpass what they and their family could reasonably be expected to contribute (e.g., their EFC) would have required an additional $308.3 million investment from the State in 2018-19, when compared to actual 2018-19 funding levels. As cost of attendance continues to increase at Oregon universities and colleges, there is a need to award more students, especially those with higher financial need in the low- and middle-income ranges. The overall cost of OOG awards under the SRM could be up to $429.3M for one year, or approximately $893M for a biennium – approximately $730M above the current OOG budget of $164.2M for 2019-21.
>
> **Ensure that today's highest-need students—those currently eligible for the OOG—receive a large enough award to fully cover their college costs.** Even with the OOG focused solely on the state's highest-need, lowest-income students, funding limitations have forced the program to severely restrict the size of those awards. High-need students should receive a large enough award to support students' access to enrollment, retention and completion of a postsecondary degree. Increasing the purchasing power of the OOG, for example, by ensuring that it fully covered unmet need for low-income students and kept pace with rising costs, would help alleviate the financial burden on students.
>
> **Make changes to the award structure to close the affordability gap.** Creating a differentiated award amount, where the award amounts increase relative to the financial need of the students (i.e., the students with the most need receive the largest awards) would help close the affordability gap in higher education. The OOG's purchasing power has decreased over time as the cost of attendance and tuition and fees rise. With a differentiated award amount, similar to Oregon's Shared Responsibility Model (SRM) or Washington State's model, the State could give meaningful awards to students to help them meet the full cost of attendance.

There is a guaranteed return on investment that the State makes toward students' OOG awards. An increase in OOG funding directly increases the flow of federal Pell Grant dollars into the state. Any investment the State makes also incentivizes federal Pell Grant-eligible FAFSA filers, as well as ORSAA filers, to matriculate and stay enrolled in college. With state funding, students' are encouraged to enroll in school and their success is supported.

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APPENDICES

APPENDIX A: YEARLY OOG ASSUMPTIONS AND AWARDING CRITERIA

TABLE 9. AVERAGE ANNUAL COA BY SECTOR AND THE THRESHOLDS FOR RECEIVING FEDERAL PELL GRANT DOLLARS AND OOG AWARDS FROM 2009-10 TO 2018-19.

	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19
Average yearly COA for public 4-year universities	$18,536	$18,966	$19,852	$20,693	$21,192	$21,540	$22,263	$23,466	$24,474	$25,232
Average yearly COA for community colleges	$15,404	$15,459	$16,415	$17,031	$17,374	$17,735	$18,223	$19,147	$19,893	$20,485
Yearly maximum EFC to receive a federal Pell Grant	4,617	4,617	5,273	4,995	5,081	5,157	5,198	5,234	5,328	5,486
Yearly awarding criteria limits, OOG	$70,000	$70,000	$70,000	$70,000	$70,000	$70,000	$4,000	$3,500	$3,500	$3,500
OOG awarding criteria metric	AGI						EFC			

TABLE 10. OSAC'S ANNUAL CUTOFF DATES FOR AWARDING OOG FUNDS FROM 2009-10 TO 2018-19.

	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19
Community colleges	8/15/2009	1/21/2010	2/4/2011	1/31/2012	1/31/2013	2/5/2014	3/21/2015	8/25/2016	8/1/2017	4/30/2018
Public 4-year universities		1/29/2010	1/31/2011				3/14/2015			
Independent private non-profit institutions		2/24/2010	2/20/2011							

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TABLE 11. AVERAGE OOG DISBURSEMENT AMOUNTS BY YEAR, BY SECTOR FROM 2009-10 TO 2018-19.

	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19
Community colleges	$1,656	$1,254	$1,273	$1,384	$1,404	$1,382	$1,429	$1,502	$1,533	$1,774
Public 4-year universities	$1,950	$1,583	$1,746	$1,766	$1,796	$1,762	$1,819	$1,909	$1,910	$2,766
Independent private non-profit institutions	$2,019	$1,609	$1,748	$1,768	$1,794	$1,775	$1,876	$1,985	$1,979	$2,889
Overall	$1,775	$1,452	$1,499	$1,569	$1,600	$1,579	$1,639	$1,696	$1,714	$2,277

TABLE 12. ANNUAL MAXIMUM AND MINIMUM OOG AWARD AMOUNTS BY SECTOR FROM 2009-10 TO 2018-19.

	2009-10**	2010-11	2011-12	2012-13*	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19
Community college maximum award	$2,600	$1,800	$1,800	$1,950	$2,000	$2,000	$2,100	$2,250	$2,250	$2,600
Public 4-year university maximum award	$2,675	$1,950	$1,950	$1,950	$2,000	$2,000	$2,100	$2,250	$2,250	$3,200
Independent private non-profit institutions average maximum award*	$2,675	$1,950	$1,950	$1,950	$2,000	$2,000	$2,100	$2,250	$2,250	$3,200
Minimum award, all sectors	$400	$400	$400	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	**For 2009-10, maximum award = $3200; maximum calculated award = $2675 for most students			*flat award amount						2-tiered award amount

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APPENDIX B: GLOSSARY OF TERMS

Variable	Definition
Academic Year	Summer term is considered the start of the academic year. For example, for an institution on a semester schedule, 2018-19 includes Summer 2018, Fall 2018 and Spring 2019. For an institution on a quarter schedule, 2018-19 includes Summer 2018, Fall 2018, Winter 2019 and Spring 2019.
Age	Age is calculated as of July 1 at the beginning of each academic year.
All Students	Annual enrollment of students who were undergraduates, residents of Oregon and were not enrolled in high school during the academic year.
Associate (Assoc. with or without certs/OTM)	Refers to the completion of an associate degree even if other certificates or Oregon Transfer Module (OTM) are completed.
Bachelor's	For public universities, refers to the completion of a bachelor's degree, regardless of lesser degree completion.
Certificate or OTM (no Assoc.)	Refers to community college award for a 1- or 2-year certificate or the completion of the 30-credit Oregon Transfer Module (OTM) without completing an associate degree.
Completion Rate (Any award OR transfer) for the 2013-14 cohort at community colleges and 2012-13 cohort at public universities	Public university completion rates show the percentage of first-time, full-time freshmen in the fall 2012 cohort who earn a bachelor's degree within six years at any of the public universities. Community college completion rates show the percentage of students who earned an associate degree or career certificate or who transferred to any 4-year university nationwide, among students who were new to the institution in fall 2013, were not enrolled in dual credit/accelerated learning and earned at least 18 quarter credits over two years or earned an award requiring fewer than 18 credits. This cohort reflects the degree-seeking cohort of the Voluntary Framework of Accountability (VFA) but with four-year outcomes.
Credit load	Students attempting 45+ credits (the minimum needed to complete an associate degree in two years or a bachelor's degree in four years), 1-44 credits and 0 credits annually. High school students enrolled in college courses generally attempt 1-44 credits annually. Metric revised in 2019.
First-generation student	These data include only students who completed a Federal Application for Student Aid (FAFSA) or Oregon Student Aid Application (ORSAA). A 1st-generation student is a student who reported that no parents completed education beyond high school or its equivalent. If one parent in a two-parent household has completed a certificate, associate degree or bachelor's degree, that student is not considered a first-generation college student.
Gender	Gender is self-reported and currently only allows for binary choice of male or female.
Graduate	For public universities, refers to the completion of a master's or doctoral degree, regardless of lesser degree completion.
Non-recipient (resident) students	Annual enrollment of students who were undergraduate, resident students only, who were not enrolled in high school during the academic year and did NOT receive an OOG award during that academic year.

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OOG recipients	Students who were undergraduate, resident students, who were not enrolled in high school during the academic year and received an OOG award during the academic year.
Pell	Students who received a federal Pell Grant during the academic year.
Race	Race is self-reported.
Retention Rate - 2016-17 cohort Fall to Fall	For public university students, retention rate shows the percentage of first-time, full-time freshmen in fall 2016 who enrolled in fall 2017. For community college students, retention rate shows the percentage of new, credential-seeking students in fall 2016 who were enrolled in fall 2017. This includes students who were new to the institution in summer or fall 2016, not enrolled in dual-credit courses after the spring of 2016 (a proxy for high school graduates) and earned at least 18 quarter credits or earned an award requiring fewer than 18 credits by the end of two years (the VFA degree-seeking cohort). For independent private non-profit institutions, this is the first year to second year, fall-to-fall retention; count of degree/credential-seeking students enrolled in the fall of the prior year that are still enrolled in the fall of the following year.

Filter	Definition
Enrollment, Annual	The headcount includes unduplicated state-wide count of all students with an enrollment record at any public university or college in the corresponding academic year. Students may be counted twice if attending multiple colleges or universities during the same term or academic year.
Enrollment, Fall	For private universities, this is the unduplicated count of degree/credential-seeking undergraduate students that are enrolled at least half-time (i.e., 6 credit hours) in fall term of the corresponding academic year. Students may be counted twice if attending multiple colleges or universities during the same term or academic year.
Residency/ "from Oregon"	Refers to Oregon residency as determined at public universities. "S" level designated as "R" refers to Oregon resident students and excludes international or non-resident students. For community college tuition purposes, a student is considered a resident after 90 days in Oregon; a residency flag can change from term to term. Due to the very small number of international students whose status for tuition may not change due to establishing Oregon residency, traditionally community colleges do not disaggregate data based on residency. At private universities, "from Oregon" means the zip code of first permanent address/address on record (i.e., not a residential dorm) is an Oregon zip code.
S level	For public universities, refers to the level of student as determined at admission (undergraduate, graduate, transfer, etc.).

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APPENDIX C: DATA NOTES AND RETENTION RATES FOR INDEPENDENT PRIVATE NON-PROFIT INSTITUTIONS

The following notes are in reference to the data submitted by the independent private non-profit institutions for this report. The independent private non-profit institutions were engaged and willing partners in the data collection and submission process. We acknowledge that this year's data collection process was used as a pilot or "stepping stone" to inform future methodical, careful collaborative projects and the annual OOG legislative report. Some institutions did not have student data accessible for particular years and these have discrepancies have been noted below.

TABLE 13. INDEPENDENT PRIVATE NON-PROFIT INSTITUTIONS IN OREGON WITH MISSING DATA POINTS.

School Name	Years Data Impacted	Notes
George Fox University	2009-10	No data. School does not have bulk data for this year, as this was the year their current Enterprise Resource Planning software was implemented.
Multnomah University	2009-10 to 2017-18	No data. School did not participate with OOG until 2018-19
National University of Natural Medicine	2009-10 to 2015-16	No data. School did not participate with OOG until 2016-17.
	2016-17 to 2018-19	Only transfer student reported since institution does not have first-time degree seeking students. They offer degree completion programs, so all OOG students are transfers.
Pacific Northwest College of Art	2009-10 to 2016-17	Incomplete data. School did not have the capacity to submit the non-OOG data fields for 2009-10 to 2016-17.
University of Western States	2009-10 to 2018-19	No retention or transfer data. OOG students were in a one-year program that did not accept transfer students. Since program was only one-year, retention is not applicable.
	2018-19	No data. The school's one-year certificate program discontinued at the end of 2017-18, so the school no longer participates in OOG.

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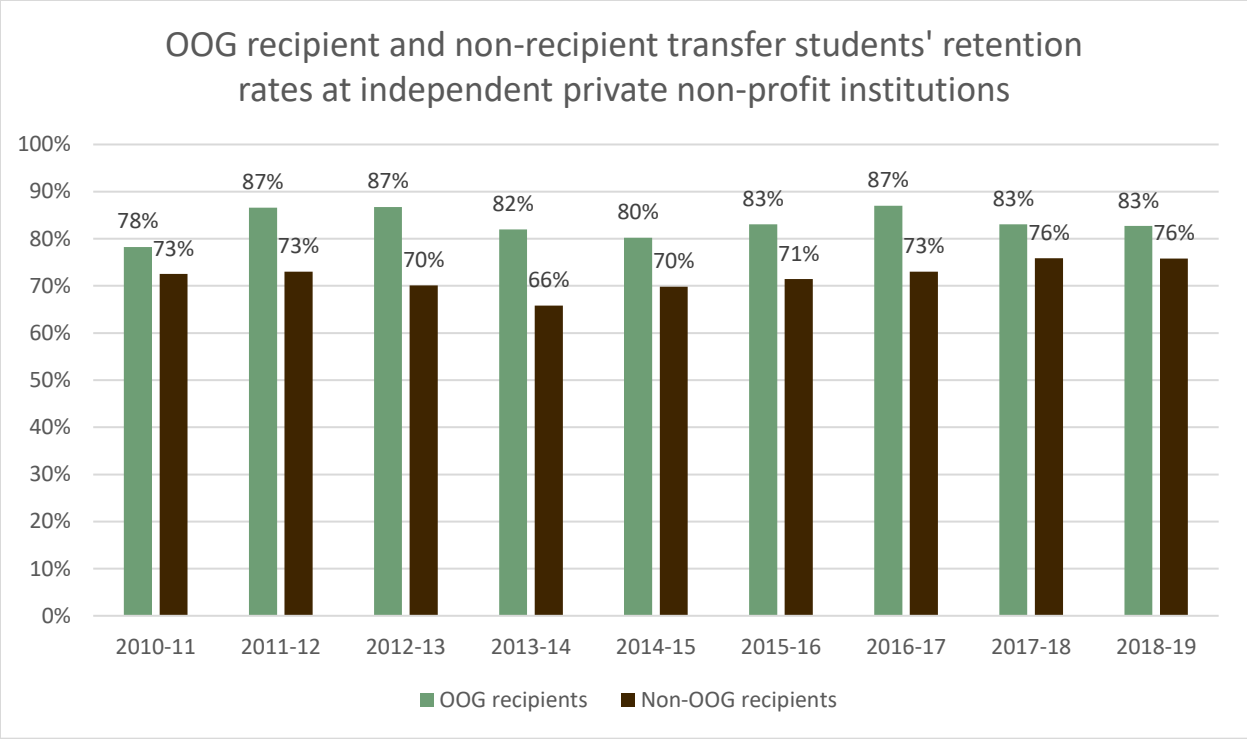

FIGURE 8. ANNUAL TRANSFER STUDENT RETENTION RATES AT INDEPENDENT PRIVATE NON-PROFIT INSTITUTIONS FROM 2010-11 TO 2018-19.

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APPENDIX D: DEMOGRAPHIC DATA FOR PUBLIC INSTITUTIONS

TABLE 14. RACE AND ETHNICITY DATA FOR OREGON COMMUNITY COLLEGES' RESIDENT STUDENTS (2009-10, 2015-16, 2017-18).

COMMUNITY COLLEGES, Race/Ethnicity						
	2009-2010		2015-16		2017-18	
Race	**OOG Recipients**	**Non-recipients**	**OOG Recipients**	**Non-recipients**	**OOG Recipients**	**Non-recipients**
Asian American	3.88%	3.19%	5.61%	3.46%	4.86%	3.46%
Black/African American	4.98%	2.08%	4.69%	2.12%	4.26%	2.03%
Hispanic/Latinx	8.99%	8.70%	16.08%	11.33%	19.91%	12.05%
International students/ nonresident aliens	0.06%	0.53%	0.10%	1.21%	0.14%	1.05%
Native American/ Alaskan Native	2.40%	1.45%	1.74%	1.18%	1.71%	1.09%
Native Hawaiian/ Pacific Islander	0.32%	0.29%	0.45%	0.39%	0.63%	0.41%
White	71.04%	59.42%	61.99%	55.98%	58.00%	54.21%
Two or more	1.85%	1.12%	5.47%	2.79%	6.21%	3.10%
Unknown	6.48%	23.24%	3.88%	21.54%	4.28%	22.60%

Source: Analysis of HECC student data.

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TABLE 15. GENDER, AGE, AND ADDITIONAL DEMOGRAPHIC DATA FOR OREGON COMMUNITY COLLEGES' RESIDENT STUDENTS (2009-10, 2015-16, 2017-18).

COMMUNITY COLLEGES, Additional Demographics							
		2009-2010		2015-16		2017-18	
		OOG Recipients	Non-recipients	OOG Recipients	Non-recipients	OOG Recipients	Non-recipients
Gender	Female	61.55%	50.79%	61.43%	50.61%	60.46%	50.15%
	Male	38.05%	45.15%	37.97%	44.51%	38.46%	44.02%
	Unknown	0.39%	4.06%	0.60%	4.87%	1.08%	5.84%
Age	<18	2.47%	7.22%	3.17%	5.35%	4.41%	5.96%
	18-24	39.46%	26.71%	47.81%	29.57%	54.47%	30.28%
	25+	58.05%	64.58%	49.01%	63.97%	41.12%	62.47%
	Unknown	0.02%	1.49%	0.01%	1.11%	0.00%	1.29%
Rural/ Urban	Rural	19.94%	18.02%	14.25%	17.94%	16.51%	18.52%
	Urban	76.30%	72.73%	76.96%	68.60%	74.10%	68.35%
	Unknown	3.77%	9.25%	8.80%	13.46%	9.39%	13.12%
First-Gen Students	First-Gen	43.15%	15.11%	44.33%	15.69%	42.11%	14.25%
	Not First-Gen	39.88%	79.86%	38.41%	79.19%	40.46%	81.21%
	Unknown	16.97%	5.03%	17.26%	5.12%	17.43%	4.55%

Source: Analysis of HECC student data.

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TABLE 16. RACE AND ETHNICITY DATA FOR OREGON PUBLIC UNIVERSITIES' RESIDENT STUDENTS (2009-10, 2015-16, 2017-18).

PUBLIC UNIVERSITIES, Race/Ethnicity						
	2009-10		2015-16		2017-18	
Race	**OOG Recipients**	**Non-recipients**	**OOG Recipients**	**Non-recipients**	**OOG Recipients**	**Non-recipients**
Asian American	7.59%	6.27%	8.39%	6.06%	8.73%	6.52%
Black/African American	3.31%	1.71%	2.85%	1.81%	3.32%	1.82%
Hispanic/Latinx	7.86%	4.68%	14.75%	8.22%	18.41%	9.50%
International students/ nonresident aliens	0.01%	0.01%	0.02%	0.32%	0.43%	0.40%
Native American/ Alaskan Native	2.22%	1.38%	1.53%	1.07%	1.41%	1.02%
Native Hawaiian/ Pacific Islander	0.62%	0.63%	0.36%	0.51%	0.40%	0.47%
White	68.89%	74.91%	61.67%	71.93%	56.87%	70.24%
Two or more	0.00%	0.00%	6.43%	5.43%	7.21%	6.17%
Unknown	9.51%	10.43%	4.01%	4.97%	3.65%	4.25%

Source: Analysis of HECC student data.

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TABLE 17. GENDER, AGE, AND ADDITIONAL DEMOGRAPHIC DATA FOR OREGON PUBLIC UNIVERSITIES' RESIDENT STUDENTS (2009-10, 2015-16, 2017-18).

PUBLIC UNIVERSITIES, Additional Demographics							
		2009-10		2015-16		2017-18	
		OOG Recipients	Non-recipients	OOG Recipients	Non-recipients	OOG Recipients	Non-recipients
Gender	Female	54.79%	52.14%	57.52%	51.08%	56.48%	51.59%
	Male	44.98%	47.58%	41.88%	48.01%	43.00%	47.60%
	Unknown	0.23%	0.28%	0.60%	0.91%	0.51%	0.81%
Age	<18	2.17%	3.60%	2.96%	3.48%	2.72%	2.99%
	18-24	57.41%	69.17%	63.36%	65.58%	64.00%	68.76%
	25+	40.41%	27.14%	33.68%	30.93%	33.28%	28.24%
	Unknown	0.01%	0.09%	0.00%	0.01%	0.00%	0.01%
Rural/ urban	Rural	19.10%	13.78%	15.68%	12.24%	15.50%	12.15%
	Urban	80.85%	86.18%	84.32%	87.74%	84.49%	87.84%
	Unknown	0.05%	0.04%	0.01%	0.03%	0.01%	0.01%
First-Generation students	First-Gen	39.24%	20.63%	40.58%	21.37%	39.86%	19.89%
	Not First-Gen	51.05%	49.13%	47.59%	57.02%	47.24%	57.19%
	Unknown	9.71%	30.24%	11.83%	21.61%	12.90%	22.92%

Source: Analysis of HECC student data.

DRAFT

TABLE 18. RACE AND ETHNICITY DATA FOR INDEPENDENT PRIVATE NON-PROFIT INSTITUTIONS' RESIDENT STUDENTS (2009-10, 2015-16, 2017-18).

INDEPENDENT PRIVATE NON-PROFIT INSTITUTIONS, Race/Ethnicity						
	2009-2010		2015-16		2017-18	
Race	**OOG Recipients**	**Non-OOG students**	**OOG Recipients**	**Non-OOG students**	**OOG Recipients**	**Non-OOG students**
Asian American	6%	5%	6%	5%	7%	6%
Black/African American	4%	2%	5%	3%	5%	3%
Hispanic/Latinx	9%	5%	18%	7%	24%	8%
International students/ nonresident aliens[19]	0%*	1%*	0%*	1%*	0%*	1%*
Native American/ Alaskan Native	2%	1%	2%	1%	2%	1%
Native Hawaiian/ Pacific Islander	1%	0%	1%	1%	1%	1%
White	67%	75%	59%	72%	50%	69%
Two or more	2%	2%	7%	6%	8%	7%
Unknown	10%	9%	5%	5%	5%	5%

Source: Analysis of independent private non-profit institutions' data

DRAFT

[19] For independent private non-profit institutions, this data classification only includes non-resident alien students.

TABLE 19. GENDER AND AGE DEMOGRAPHIC DATA FOR INDEPENDENT PRIVATE NON-PROFIT INSTITUTIONS' RESIDENT STUDENTS (2009-10, 2015-16, 2017-18).

INDEPENDENT PRIVATE NON-PROFIT INSTITUTIONS, Additional Demographics[20]						
	2009-2010		2015-16		2017-18	
	OOG Recipients	Non-OOG students	OOG Recipients	Non-OOG students	OOG Recipients	Non-OOG students
Gender						
Female	66%	61%	66%	60%	68%	63%
Male	34%	38%	34%	40%	32%	37%
Unknown	0%	0%	0%	0%	0%	0%
Age						
<18	2%	2%	2%	3%	1%	3%
18-24	66%	76%	74%	76%	74%	79%
25+	32%	22%	24%	21%	24%	18%
Unknown	0%	0%	0%	0%	0%	0%

Source: Analysis of independent private non-profit institutions' data

DRAFT

[20]Data on rural/urban status and first-generation student status were not available for independent private non-profit institutions.

APPENDIX E: OOG RECIPIENTS & NON-RECIPIENTS: GENDER THROUGH TIME

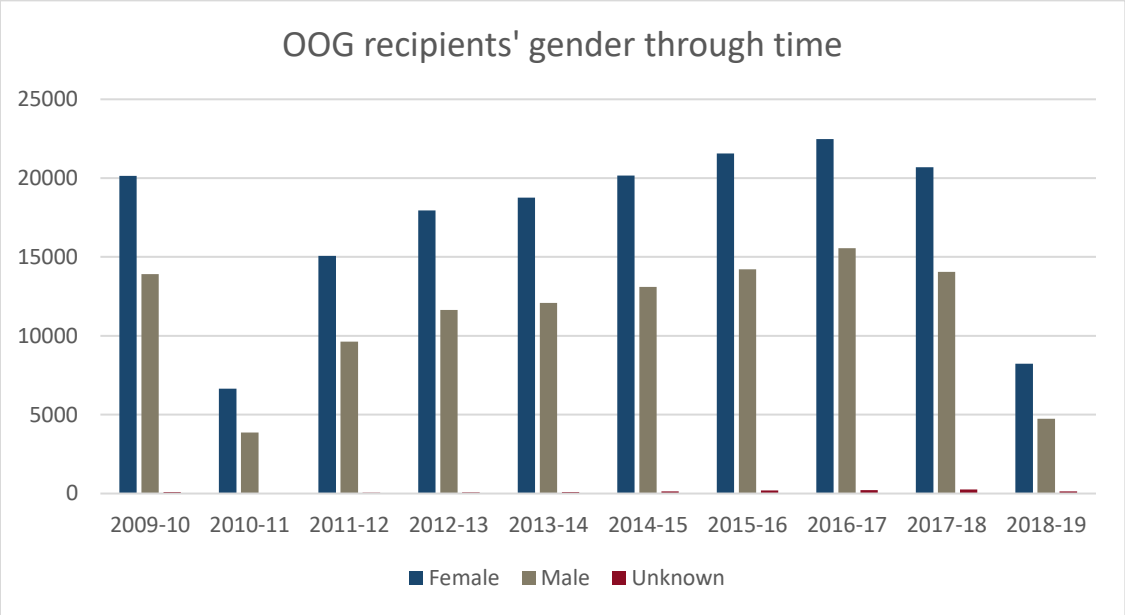


FIGURE 9. NUMBER OF OOG RECIPIENTS WHO IDENTIFIED AS MALE OR FEMALE THROUGH TIME.

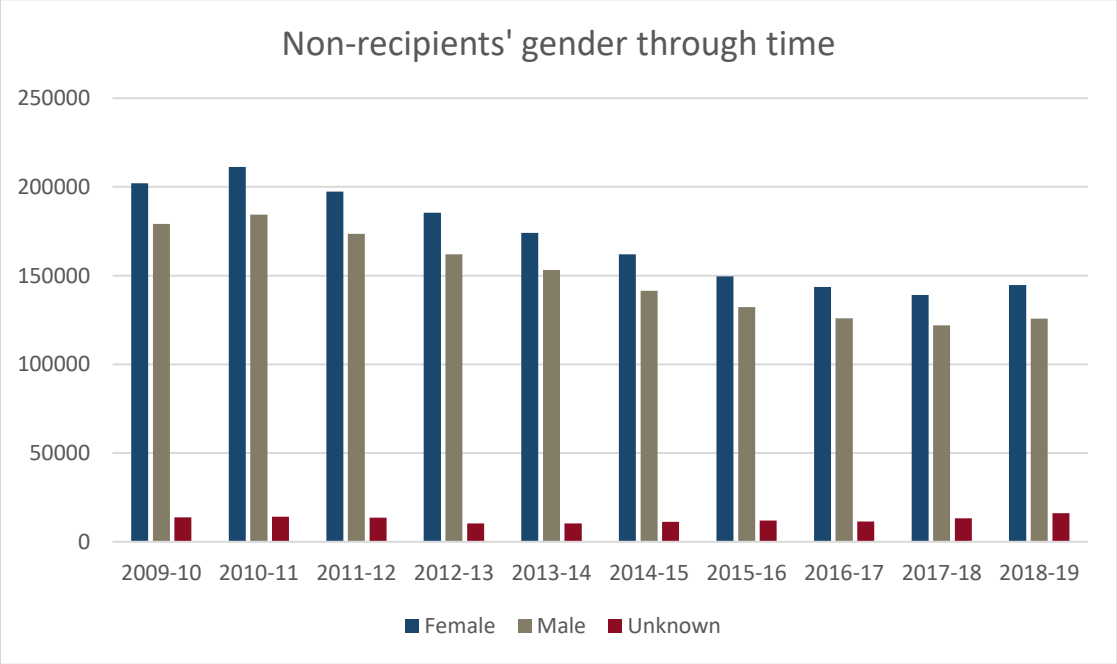


FIGURE 10. NUMBER OF NON-RECIPIENTS WHO IDENTIFIED AS MALE OR FEMALE THROUGH TIME.

APPENDIX F: OOG RECIPIENTS & NON-RECIPIENTS: AGE THROUGH TIME

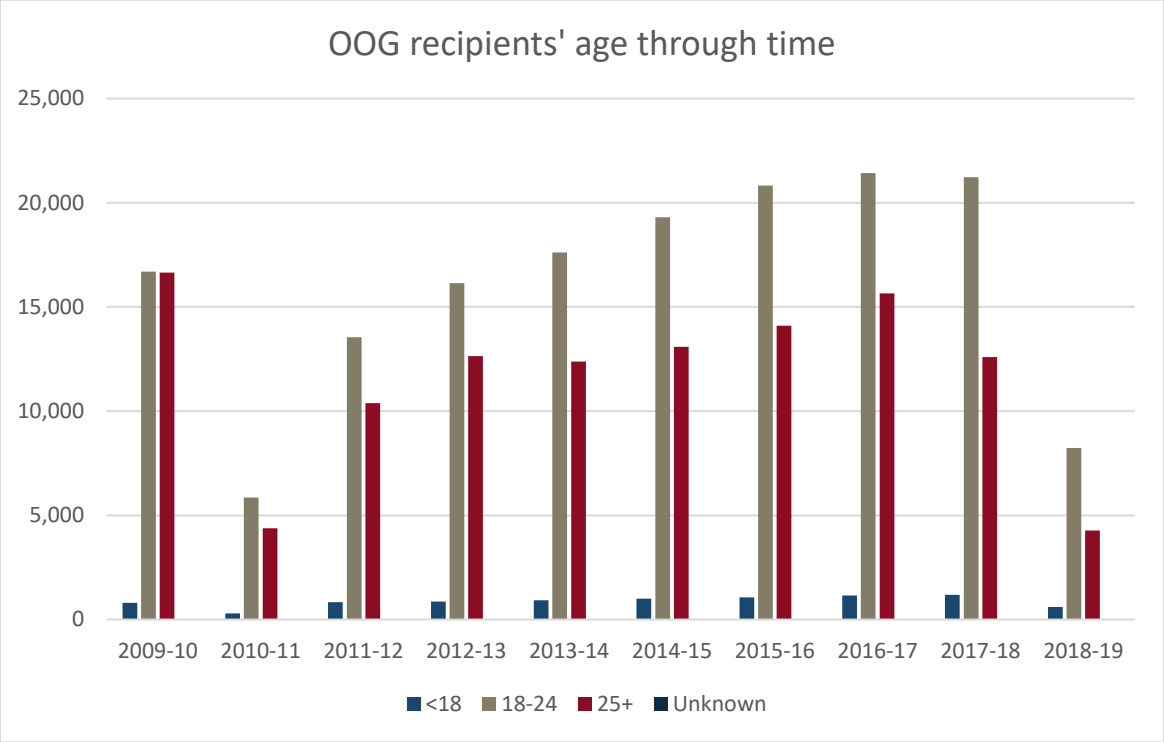


FIGURE 11. NUMBER OF OOG RECIPIENTS PER AGE RANGE THROUGH TIME.

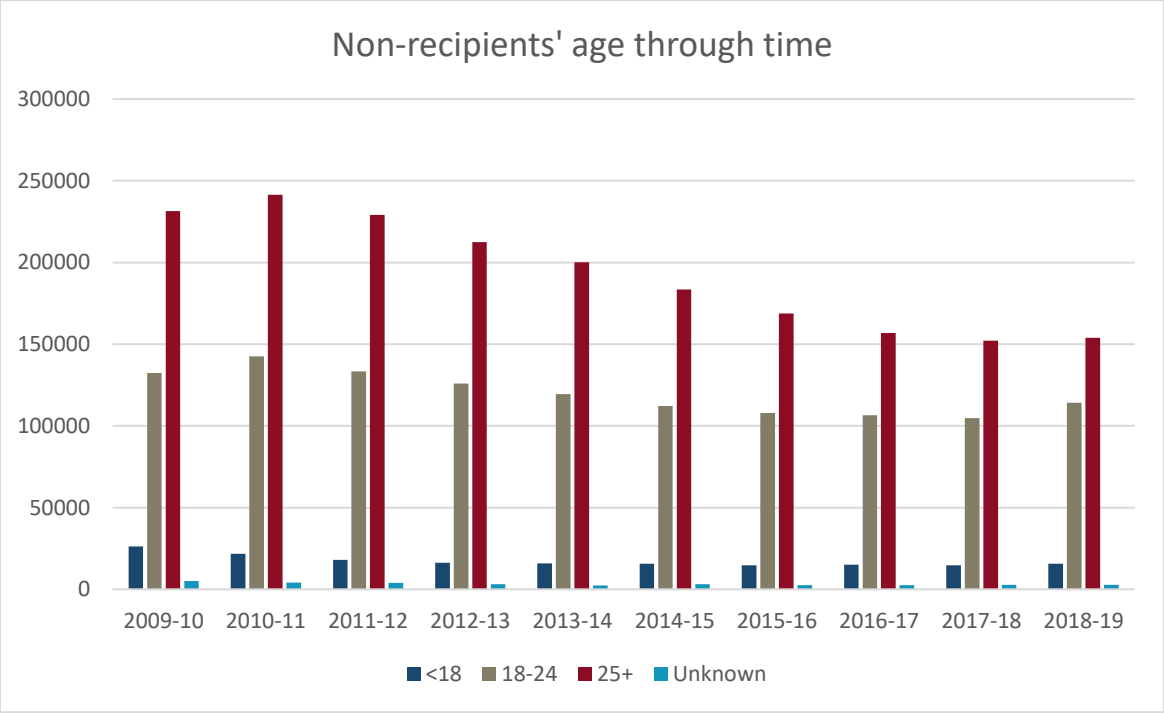


FIGURE 12. NUMBER OF NON-RECIPIENTS PER AGE RANGE THROUGH TIME.

APPENDIX G: OOG RECIPIENTS & NON-RECIPIENTS: FIRST-GENERATION STATUS

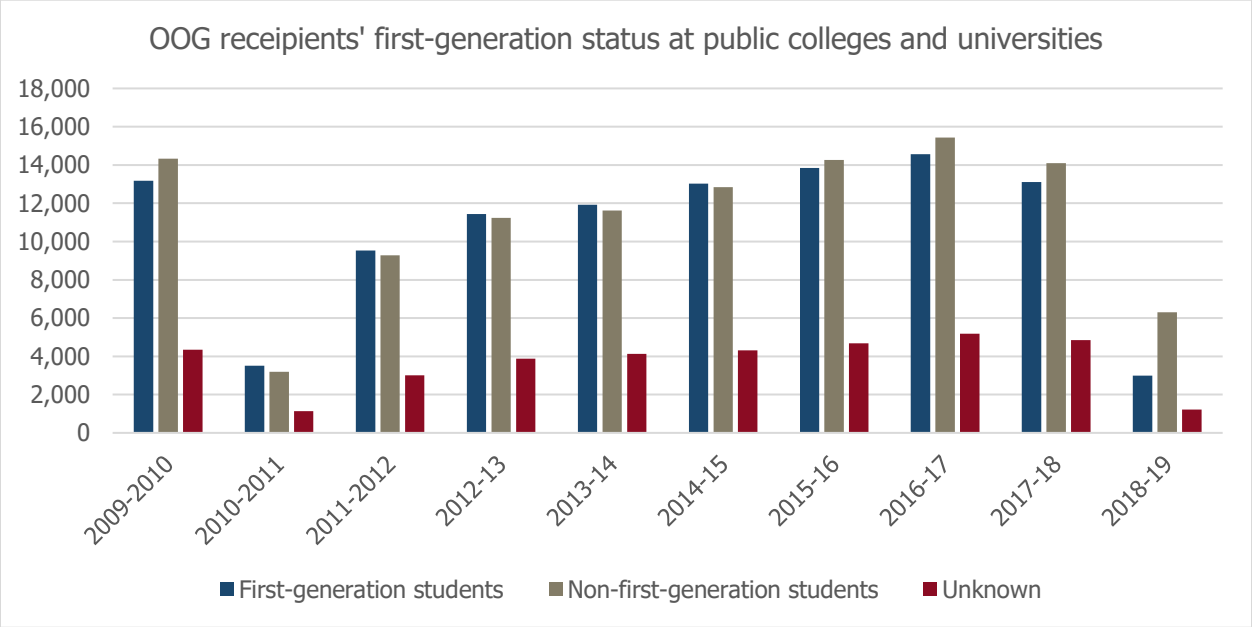


FIGURE 13. NUMBER OF OOG RECIPIENTS BASED ON FIRST-GENERATION STUDENT STATUS THROUGH TIME.

Notes: Data not available for private non-profit colleges. Public university data unavailable for 2018-19.

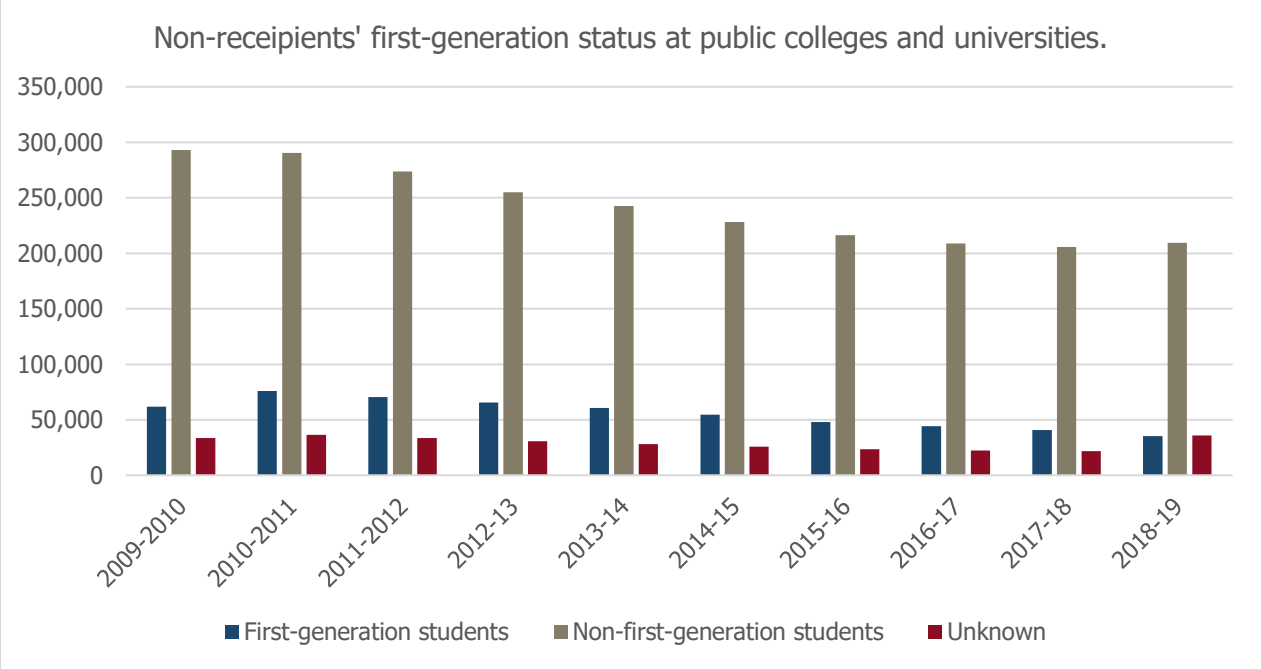


FIGURE 14. NUMBER OF NON-RECIPIENTS BASED ON FIRST-GENERATION STUDENT STATUS THROUGH TIME.

HIGHER EDUCATION
COORDINATING COMMISSION

HIGHER EDUCATION COORDINATING COMMISSION
Office of Postsecondary Finance and Capital
255 Capitol Street NE, Salem, OR 97310
www.oregon.gov/HigherEd

Docket Item:

2020 Public University Capital Recommendations

Summary:

The HECC is responsible for submitting to the Governor and Legislature a prioritized list of public university capital recommendations for consideration during the 2020 Legislative session.

Following its receipt of the Strategic Capital Development Plan Report in October, the Commission adopted a revised capital rubric that reflected several of the recommendations of the Plan. Subsequently, staff employed the rubric to score sixteen projects that had been submitted by public universities for potential funding.

The list of staff-prioritized projects, along with narrative summaries of each, is included in the appendix for the Commission's consideration. A draft letter of transmission, that includes a number of policy recommendations, is included for review.

Docket Material:

During the 2019 legislative session, although funding was approved for capital improvement and renewal as well as the Oregon Manufacturing Innovation Center, the consideration of other university capital was delayed until the Strategic Capital Development Plan was completed. After receiving the Plan, the HECC revised the university capital rubric to focus on alignment with the Plan and other state priorities. The HECC-approved, prioritized list of projects will then be submitted as appropriate.

Timeline

February – September	Strategic Capital Development Plan (SCDP) Work
October 10	Presentation of SCDP Report and adoption of revised capital rubric
October 21	Deadline for university submission of proposed projects
November 7	Overview of submissions and grading process
December 11-12	HECC consideration/adoption of prioritized projects
December 13, 2019	Submission of prioritized projects to DAS/LFO

HECC University Capital Principles
The prioritization process is not a distribution model. All state-backed debt will support E&G space and support program needs for the 21st century, extend the capacity of existing facilities to support student success, and align capital investments with workforce and economic development needs.

Projects that demonstrate the following will be prioritized:

- Capital renewal approach that repurposes existing space
- Operational cost savings along with safety and security
- Public-private and multi-party collaborations
- Leveraging of private resources and institutional funds

Revised Rubric
The rubric includes nine components worth a total of 100 points. The full, detailed rubric is included in appendix A for reference.

52% Based on Alignment with Strategic Capital Development Plan:
24 points – Space renewal, workforce or completion priorities
12 points – Addressing deferred maintenance issues
8 points – Supports research and economic development
8 points – Collaboration with interested parties

48% Based on Other State Priorities:
15 points – Leveraging institutional resources
10 points – Student Success for Underserved Populations
10 points – Life safety, security, or loss of use
8 points – Operational savings and sustainability
5 points – Institutional priority

Submitted Projects
A total of 21 projects were submitted. Thirteen were existing projects totaling $415.3 million of which $85.9 million is from institutional funds. These projects were submitted during the spring of 2018 during the normal budget process.

There are three new projects that total $69.5 million of which $5.5 million is from institutional funds. One of the projects is a demolition that will not qualify for bond funding but was included at staff request in order to provide more information on institutional need.

Five are self-funded projects totaling $138 million entirely from institutional funds. Three are residence hall projects. The self-funded projects are not prioritized but included for reference.

Process and Prioritization
The projects were considered by cross-functional grading teams composed of HECC staff. Teams scored the projects in accordance with the capital rubric as adopted by the Commission. Projects were prioritized based on their alignment with state priorities. The prioritized list is included in appendix B with summaries of all projects included in appendix C.

Each project was scored separately. Institutions were allowed to submit as many projects as they choose although they submitted mostly existing projects previously considered during the ARB process last year. OSU-Cascades was allowed its own institutional priority but was included with OSU-Corvallis for leveraging institutional resources.

Noteworthy Project Examples

Strategic Capital Development Plan Alignment – OSU Cordley Hall Renovation, Phase II
The Cordley Hall Renovation project will transform an aged and worn out facility, which was designed for research as it was conducted over 50 years ago, into a modern research and education facility. Phase I, already funded, is centered on replacing mechanical and electrical systems. Phase II will focus on re-organizing the teaching and research spaces to create more flexible and active learning focused spaces.

Cordley Hall is central to biological sciences at OSU. Biology is the fourth largest major with over 1,200 students. Courses taught in Cordley Hall are required for over 30% of OSU undergraduates and the introductory biology and botany courses for non-majors serve over 70 majors in eight colleges. Over 600 undergraduates have had research experiences in the last four years with over 400 serving as learning assistants. OSU thoroughly explained how this project will address space renewal, focus on STEM related completions, address deferred maintenance issues, support research opportunities, and incorporate collaboration opportunities.

Operational Savings and Sustainability – PSU Science Building 1 (SB1) Renovation and Expansion

This proposed project transforms the outdated science building into a modern facility well equipped to educate the next generation of health and science professionals. Highly STEM centric, the upgraded facility will demonstrate energy savings due to lighting upgrades and HVAC heat recovery. A reduction of 25-30% is estimated in energy consumed by lighting alone. PSU provided data to demonstrate the reduction in operating costs and the sustainability associated with heat recovery technology.

Life Safety, Security, or Loss of Use – OIT Boivin Hall
Boivin Hall has been largely unmodified since its construction in 1976. It houses the only chemistry labs on campus for all undergraduate students. With asbestos issues and other life safety concerns, OIT comprehensively demonstrated how this facility is in need of intervention and will cause severe disruption to the student experience should it suffer a catastrophic loss of use.

Student Success for Underserved Population – WOU Student Success Center
The Student Success Center is the cornerstone of WOU's efforts to maximize retention and graduation rates. Clustering student support services, and allowing for additional space for student engagement, will support these efforts. WOU explicitly defined the projected impact on retention and graduation rates as a result of this project and set clear expectations.

Policy Recommendations
The strategic capital development plan (SCDP) has guided the process of revising the rubric. In addition, a number of key findings and recommendations in the report could also make for effective policy and should be communicated to the Legislature.

A draft letter of transmission is included in appendix D for consideration. The letter includes the following policy recommendations:

- **Incorporate a broader definition of capital investment**. Funding demolition projects without a replacement of like facilities.
- **Focus on capital improvement and renewal (CIR)**. Provide additional funding through the existing CIR formula to drive more funding to institutional deferred maintenance projects.
- **Pursue process improvements**. Collect facility inventory and other relevant data upon to allow for a better understanding of capital needs.

Staff Recommendation:

(*Pending action by the Funding and Achievement Subcommittee 12/11):* Staff recommends the Commission approve the 2020 Public University Capital recommendations for submission to the Governor and Legislature.

A motion to adopt the prioritized list as presented for the Commission's consideration.

Appendix A: Revised 2019-2021 University Capital Project Rubric

100 Total Points Available

A **Strategic Capital Development Plan**
1-52 Points

Points	Components within the Plan
24	**Space renewal, workforce or completion priorities** Proposals that increase the efficiency and effectiveness of educational and general space as measured by space utilization statistics. Or address workforce needs pursuant to the SCDP as demonstrated by the measured gaps in completers versus job openings. Or support student success and degree completion numbers pursuant to the 40-40-20 Strategic Plan.
12	**Addressing deferred maintenance issues** Proposals that either reduce deferred maintenance or lead the institution to create a deferred maintenance set aside account to proactively address future deferred maintenance needs.
8	**Supports research and economic development** Proposals that develop space in support of the expansion of research efforts or the potential for additional research grant funding. Or create and expand employment opportunities relative to economy and workforce needs indicated in the SCDP by institution. Or support degree programs that are important to employers.
8	**Collaboration with interested parties** Proposals that include collaborative efforts between the university and other public service entities (or related parties) or the creation of consortia.

B **Operational Savings and Sustainability**
1-8 Points

Projects are scored based on cost savings generated by operational savings. Or the potential for sustainability. Sustainability is defined as the ability to support continued efficiency or a project that possesses the quality of not being harmful to the environment or depleting natural resources.

C **1-10 Points**	**Life Safety, Security, or Loss of Use**

Projects are scored based on the priority of the project to meet life, safety and code compliance needs of mission critical items, including lifecycle cost analysis or projects that support key programs and initiatives.

1. **Life Safety**. For a project to be considered critical, the project must predominantly address facility deficiencies (code compliance) related to the health, safety, and welfare of the occupants and the public. The request will be considered as to the significance of the hazard or risk the facility conditions pose and the immediacy of the period requested to address those concerns.

2. **Security**. The proposal supports a safe and secure environment in all buildings and grounds owned, leased and/or operated by the universities. The proposal promotes safety through policies and programs. The proposal safeguards the university's property and physical assets.

3. **Loss of Use**. A project may be considered critical if it addresses imminent loss of use due to facility deficiencies. These can include mechanical, electrical, or structural systems as well as the accreditation requirements of a program. Critical loss of use projects would directly result in the inability of that program to function in the related area and/or maintain the funding necessary to sustain that program.

D **1-5 Points**	**Institutional Priority**

Each institution will identify the top three projects from only the tier one category as defined by the university presidents:

5 points – 1st priority
3 points – 2nd priority
1 points – 3rd priority

E **Student Success for Underserved Populations**
1-10 Points

Projects are considered based on the expected impact of the project on student success as defined by degree or certificate attainment or the reduction of equity gaps, with special emphasis on those underserved populations that are similarly emphasized in the Student Success and Completion Model:

1. Low income
2. Underrepresented minority
3. Rural
4. Veteran

F **Leveraging Institutional Resources**
1-15 Points

External funding should be a factor in prioritizing projects, but should not inappropriately determine institutional or state priorities. The campus match component identifies a minimum percentage of project costs to be borne by the institution, ideally from external funding but which could include grants, donations or other funds not derived from institutional or state resources.

Technical and Regional institutions have an adjusted matching schedule to acknowledge a smaller external funding base in the rural communities of the state. The matching expectation is also adjusted by the type of project whether it is new construction or the major renovation of an existing facility.

Ten points are based on the level of matching and five points are based on the availability of funds according to the schedules below.

OSU and UO Matching		
% Match	**New Construction**	**Major Renovation**
25% or over	10	10
24%	8	10
15%	6	10
10%	5	9
5%	4	5

OR

PSU Matching		
% Match	**New Construction**	**Major Renovation**
15% or over	10	10
12%	8	10
9%	6	10
6%	5	9
3%	4	5

OR

Technical Regional Matching (EOU, SOU, OIT, WOU)		
% Match	**New Construction**	**Major Renovation**
5% or more	10	10
4%	8	10
3%	6	10
2%	4	7
1%	2	5

AND

Majority pledged or in hand verified in proposal	
% Match	**Points**
100% add	5
75% add	4
50% add	3
25% add	2
0%>=10% add	1
0%	0

Appendix B: Prioritized List of Public University Capital Projects

Priority	Institution	Project Submittals	HECC Rubric Score	XI-G	XI-Q	Subtotal	Gifts/Other	Project Total	State Running Total
1	OSU	Cordley Hall Renovation, Phase II	95	$ 28,000,000	$ -	$ 28,000,000	$ 28,000,000	$ 56,000,000	$ 28,000,000
2	OIT	Boivin Hall Rehabilitation	93	$ 1,015,000	$ 18,270,000	$ 19,285,000	$ 1,015,000	$ 20,300,000	$ 47,285,000
3	PSU	SB1 Renovation & Expansion	92	$ 7,500,000	$ 67,500,000	$ 75,000,000	$ 7,500,000	$ 82,500,000	$ 122,285,000
4	WOU	Student Success Center	91	$ -	$ 21,340,000	$ 21,340,000	$ 660,000	$ 22,000,000	$ 143,625,000
5	UO	Huestis Hall Deferred Maintenance	89	$ 6,360,000	$ 50,880,000	$ 57,240,000	$ 6,360,000	$ 63,600,000	$ 200,865,000
6	OSU	Arts and Education Complex	85	$ 35,000,000	$ -	$ 35,000,000	$ 35,000,000	$ 70,000,000	$ 235,865,000
7	OSU-CC	Student Success Center	84	$ 5,000,000	$ 7,900,000	$ 12,900,000	$ 5,000,000	$ 17,900,000	$ 248,765,000
8	WOU	Health Science Remodel	83	$ -	$ 48,015,000	$ 48,015,000	$ 1,485,000	$ 49,500,000	$ 296,780,000
9	EOU	Inlow Hall Renovation, Phase II	74	$ -	$ 10,600,000	$ 10,600,000	$ -	$ 10,600,000	$ 307,380,000
10	SOU	Music Renovation & DMC Addition	74	$ -	$ 13,650,000	$ 13,650,000	$ 450,000	$ 14,100,000	$ 321,030,000
11	SOU	Britt Phase II DM & Creative Institute	66	$ -	$ 4,700,000	$ 4,700,000	$ 50,000	$ 4,750,000	$ 325,730,000
12	WOU	Performing Arts Remodel	63	$ -	$ 16,005,000	$ 16,005,000	$ 495,000	$ 16,500,000	$ 341,735,000
13	WOU	Achievement, Movement and	51	$ -	$ 30,264,000	$ 30,264,000	$ 936,000	$ 31,200,000	$ 371,999,000
14	EOU	Grand Staircase Replacement	40	$ -	$ 3,000,000	$ 3,000,000	$ 80,000	$ 3,080,000	$ 374,999,000
15	OSU-CC	Land Development - Area 2	35	$ 835,000	$ 15,830,000	$ 16,665,000	$ 835,000	$ 17,500,000	$ 391,664,000
N/A	SOU	Cascade Hall Demolition	N/A	$ -	$ -	$ -	$ 3,500,000	$ 3,500,000	
		Total/Average	**74**	**$ 83,710,000**	**$ 307,954,000**	**$ 391,664,000**	**$ 91,366,000**	**$ 483,030,000**	

Self Funded Projects - Not graded		
EOU	New Residence Hall	$ 14,000,000
OIT	New Residence Hall	$ 45,000,000
PSU	12th & Market Residence Hall	$ 60,500,000
PSU	University Center Building Land Purchase	$ 15,000,000
WOU	Valsetz Dining & Auxilliary Services Renovation	$ 3,500,000
Self funded Totals		**$ 138,000,000**

Appendix C: Project Summaries

OSU – Cordley Hall Renvoation, Phase II

The Cordley Hall Renovation project will transform an aged and over-worn facility, designed for research as it was conducted over fifty years ago, into a modern and forward thinking research and education building. Cordley Hall is the home of two large departments that are central to the biological sciences at OSU, Integrative Biology (IB) and Botany and Plant Pathology (BPP). In an effort that lays the groundwork for the future, the two departments have collaborated to generate a collective vision for a new Cordley that will help transform biology – in both research and education – at Oregon State University. Cordley Hall will become an innovative space whose core design principles of integration, collaboration, and engagement will enhance OSU's impact in all facets of its mission related to the life sciences - where OSU can conduct its world-class science, inspire students, and engage the public.

OIT – Boivin Hall Rehabilitation

Boivin Hall is a core teaching, learning and student services building on Oregon Tech's Klamath Falls campus. It houses the campus' only chemistry labs, many classrooms of various sizes, faculty offices, the university Information Technology Services (ITS) offices, helpdesk and networking infrastructure as well as, and most importantly, the student support and retention center. The Boivin Hall Project includes a complete overhaul of Boivin Hall, including seismic retrofit, mechanical, electrical and plumbing (MEP) replacement, building envelope replacement, foundation repair, full interior (classroom and lab) remodel and modernization. Also included in the project are improvements to the surrounding areas including ADA accessibility, sidewalk, transportation improvements and landscaping improvements that will preserve the integrity of the building envelope and site stability.

PSU – Science Building 1 Renovation and Expansion

Today, nearly 700 students, faculty and staff learn, teach and work every day in Portland State University's Science Building 1 – a facility in great need of safety, seismic and system upgrades. When completed, the remodeled building, with modern capabilities and integrated academic and student success programs, will serve over 4,200 students. The Science Building 1 Renovation & Expansion Project (SB1 Project) meets a critical need for PSU, creating a model teaching facility for a university that leads all other public universities in Oregon in the education of first-generation students, Underrepresented Minorities (URM), veterans and Pell Grant recipients.

WOU – Student Success Center

The Student Success Center creates one location where students can receive tutoring, study with their peers, or get career advice. This will greatly simplify and clarify the often intimidating nature of higher education for first-generation college students. The central location is a part of the 2018 campus master

plan and naturally leads to greater student utilization, providing them access to the important services they need to complete their degrees in a timely manner. The proposed approach to completely replace the existing building with a new structure relieves the campus of nearly $1.2 million of deferred maintenance costs and a myriad of code related safety and security issues.

UO – Huestis Hall Deferred Maintenance

The $63.6 million project--$57.24 million from the state and $6.36 million from university match—will fully renovate Huestis Hall, eliminating a portion of the University of Oregon's (UO) deferred maintenance backlog and ameliorating serious security and safety issues. It will also resolve code violations, improve accessibility for faculty, students and staff, and update and modernize laboratory and learning spaces.

OSU – Arts and Education Complex

The Arts and Education Complex at Oregon State University will enhance the experience and education and open doors for all of our students – a necessity for a world-class research university. It will bring together programs in the arts, including music and theater, creating a thriving center of creativity infused with science and technology. Key components of the Arts and Education Complex include technology and medium rich teaching, performance and rehearsal spaces; a new visual arts museum; shop and maker space with electronic and computer studio for designing sound, lighting, etc.

OSU Cascades – Student Success Center

The Student Success Center will house a variety of support services designed to increase graduation and retention rates, prepare students for the workforce, and connect them to future employment. The future center will house internship coordination, career advising, academic advising, tutoring, mental health counseling, health wellness center, and study and gathering spaces to support multicultural students, veterans and transfer students.

WOU – Health Science Remodel

The project is a remodel of the existing Academic Programs and Support Center structure built in 1951 and an addition of 76,800 gsf. The eastern portions of the remodel are most suited for the new uses and will include upgrades to most of the systems within this portion of the building including, but not limited to, mechanical, electrical, and plumbing. These upgrades will resolve all of the deferred maintenance needs for this part of the building. The remaining deferred maintenance needs of the current building will be resolved by the demolition of the western parts (those closest to the street).

EOU – Inlow Hall Renovation, Phase II
Improve Inlow to retain critical student service functions, such as Admissions, Financial Aid, Advising, Registrar, and Student Accounts. Complete the seismic improvements started in Phase 1. Improve energy efficiency and thermal conditions for users. Address critical access and life/safety issues in and around the building.

SOU – Music Hall Renovation and Digital Media Center Addition
The project will upgrade and enhance the SOU Music Building, and repurposes it as SOU's Creative Industries Center including the addition of a new wing for SOU's Digital Media Center. Constructed in the 1970s, the Music Building was designed to the music industry standards of the time and requires updates to support instructional, performance, administrative and infrastructural demands. The project will allow SOU's Music program to respond to current and future industry standards in music and music education, and broadens the scope of the facility to an integrative and collaborative Creative Industries function. This project will resolve demand for space and capacity in the Digital Media Center.

SOU – Britt Hall Phase II Deferred Maintenance and Creativity Institute
The SOU campus currently lacks active learning facilities. This project establishes a unique opportunity for SOU to become an internationally recognized leader in creativity and innovation. The SOU Creativity Institute is a research and education center with a mission to help individuals and organizations leverage creativity research to help solve complex problems. Grounded in the science of creativity, the Institute seeks to become an internationally recognized hub for creative theory and scholarship and serve as both a resource and incubator for creativity and innovation. This proposal outlines the plans for a redesign of a portion of the existing Britt Hall space.

WOU – Performing Arts Remodel
The Performing Arts project involves two adjacent buildings. Rice Auditorium built in 1976 and Smith Hall built in 1958 are used together to support academic programs in Performing Arts: Music, Theatre and Dance. Both buildings are also used for community events that support music and theater performances. Both buildings are in need of significant mechanical upgrades and deferred maintenance projects.

WOU – Physical Education Building Addition and Remodel
Center for Human Achievement, Movement and Performance (CHAMP) - This project will transform the southwest segment of the campus into a state-of-the-art multipurpose center dedicated to building strong community partnerships and enhancing student success and achievement.

EOU – Grand Staircase Replacement
The Inlow Hall Grand Staircase is a special and significant historic structure, registered with both state and national historical landmark designations because of its architectural significance as well as its cultural value. Address significant safety concerns that currently exist and eliminate an attractive nuisance.

OSU Cascades – Land Development Area 2
To advance the physical development of OSU-Cascades' 128-acre campus and support the growing academic and campus life programming, a second phase of land development is necessary to build a future academic building 3 and the health and recreation center. The land was purchased for $1 from Deschutes County. The project will include landfill remediation, compacting and grading the site for future building pads, and site infrastructure, including roads, sewer, water and IT infrastructure. The work will result in buildable land and infrastructure.

SOU – Cascade Hall Demolition
SOU would like to demolish the Cascade Complex, an old dormitory complex located at 1450 Madrone Street, constructed between 1961 and 1967 and used primarily for storage and flex space. It is at the end of its useful life and located on the edge of campus. We estimate the cost of demolition at approximately $3.5 million witn a concurrent reduction of approximately $12M in deferred maintenance. A cost-effective Public Private Partnership (P3) project on that site is being considered.

Self-Funded Projects

EOU – New Residence Hall
The recently developed "Strategic Plan Framework" sets aggressive enrollment growth targets for EOU and a meaningful portion of this growth will be in first-year students. Currently, the number of students living on campus is nearing at capacity and the options for adding small increments of capacity are dwindling. Based on enrollment and occupancy projections, EOU will need to add 77 beds by Fall 2023 and another 150 beds by Fall 2026. This specific request is for phase I of the Residential Capacity Project.

OIT – New Residence Hall
Oregon Tech will see the largest freshmen class of all time during Fall 2019 with an increase of nearly 15% over the previous year. New transfer students are up by 9%. Applications for Fall 2020 are up by 450% year-over-year. Current housing facilities are nearing full capacity. Within the next two to three years Oregon Tech will run out of housing capacity at its current growth rates. The New Residence Hall project will add a 900 bed traditional residence hall facility on the Klamath Falls campus of Oregon

Tech. This facility will be located near existing residence hall, dining and student recreation facilities limited the need for additional non-bedroom capacity.

PSU – 12th & Market Residence Hall

PSU proposes to construct a 7 story housing building with approximately 450 beds and 11,000 sq. ft. for dining services. The proposed building is to be constructed on 38,000 sq. ft. vacant parcel in the northwest portion of campus on the corner of SW 12th and Market. The parcel is adjacent to the Blumel Residence Hall. The proposed project will be approximately 144,000 sq. ft. and be constructed with a wood frame on a concrete base, a very cost effective building method for residence halls. In addition to 450 beds and dining, the building will have multiple study lounges on each floor and common areas on the ground floor that could include a secure bike room and a communal kitchen.

PSU – University Center Building Land Purchase

This is a request to reauthorize XI-F debt for University Center Building, first authorized in 2013. PSU currently owns the University Center Building (UCB) but not the underlying land. PSU has a long-term land lease that expires in 2023 at which time the improvements revert back to the landlord. The lease rate is scheduled to increase from $748,230/year to over $1,000,000 a year in 2018. Debt service on the land, if owned by PSU, is anticipated to be less than the current lease rate beginning in 2018. PSU received authorization in the 2017 legislative session for $15 million in XI-F bonds. This request is for a reauthorization of the $15 million in XI-F bonds.

WOU – Valsetz Dining & Auxiliary Services Renovation

Valsetz Dining Hall serves the entire campus population. Primarily used for feeding the Student Dorm population averages 2700 meals per day. Increased capacity will allow for more and larger conferences. It seats approximately 400 people. For large groups this requires staggered meal times and a greater amount of time dedicated to meal times instead of event times. In order to accommodate larger groups and more conferences, electrical, and refrigeration upgrades will be necessary.

Appendix D: Draft Letter of Transmittal

December 13, 2019

Senator Betsy Johnson
Senator Elizabeth Steiner Hayward
Representative Dan Rayfield
Joint Committee on Ways and Means
900 Court Street NE
H-178 State Capitol
Salem, OR 97301

Dear Co-Chairpersons:

As described by Oregon statute, the Higher Education Coordinating Commission (HECC) receives requests from public universities that wish to receive state funding for capital projects and shall "decide whether, and in what manner, to make a request for the issuance of state bonds to the Legislative Assembly" (ORS 352.089(5)). In recognition that state debt capacity is limited and that competition for state bonds is high, the Commission elected to prioritize university capital requests based on their alignment with state priorities. After a rigorous review and scoring process and significant Commission consideration, the HECC's prioritized list of capital projects is attached for your consideration. We strongly urge the 2020 Legislature to approve these projects, the completion of which will enhance the educational, civic, and economic well-being of our public universities, their communities, and the State of Oregon.

To permit an objective analysis of each project request, the HECC employed a rubric that assigns point values to projects that reflect many of the Commission-adopted principles. These include that all state-backed debt will support educational (E&G) space, will support program needs for the 21st century, will extend the capacity of existing facilities to support student success, and will align capital investments with workforce and economic development needs.

Projects that demonstrated the following were prioritized:

- Capital renewal approach that repurposes existing space
- Supports student success, workforce and economic development needs
- Operational cost savings along with fixing safety and security issues
- Public-private and multi-party collaborations
- Leveraging of private resources and institutional funds

The HECC adopted a revised rubric in October that places a greater emphasis on renewal and repair with additional focus on the success of underserved students, addressing deferred maintenance, collaboration and alignment with state goals. This was done in response to the creation of a 10-year comprehensive strategic capital development plan (SCDP) for Oregon's public universities in an effort to take a broader view of the higher education capital investments needed to meet the state's 40/40/20 goal.

However, the rubric is just one tangible result of the SCDP work. Policy recommendations are included below that are also derived from the key findings in the report. We hope the Legislature will consider these in conjunction with the prioritized list of capital projects.

1) Incorporate a Broader Definition of Capital Investment

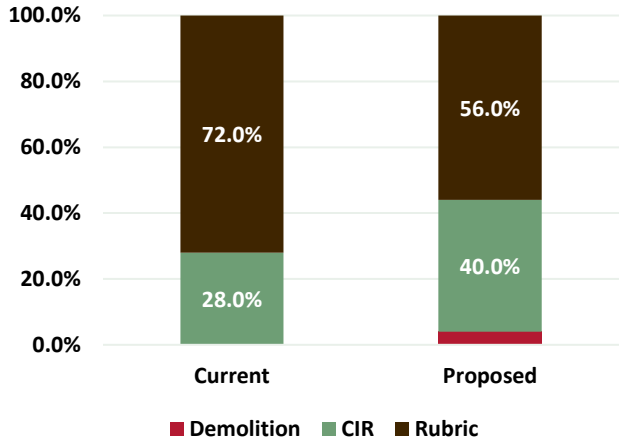
To consider capital investments more broadly, as recommended in the SCDP, the state's capital commitment could be broadened to include the last phase of a facility's life cycle, which is the demolition of property that is at the end of its useable life. Given the ineligibility of demolition projects for state bonding, the state could appropriate funding for the demolition of facilities deemed not salvageable and well beyond their useful life. Doing so will address significant, existing deferred maintenance and would be done in light of an overall surplus of space.

A pool of $8 – 10 million could be sufficient for this purpose based on existing need. An example of an existing need is the Cascade Hall demolition project at SOU. This post-WWII era building is well beyond its useful life and could be demolished in light of a surplus of instructional space on campus. It is more cost effective to demolish it then to modernize it. This $3.5 million demolition would remove $12 million in deferred maintenance.

2) Focus on Capital Improvement and Renewal (CIR)

The headline recommendation of the SCDP is to focus on the renewal and improvement of existing space to support student success. A collaboratively developed formula currently exists for that purpose. A larger share of the total investment devoted to the existing CIR formula would allow institutions to tackle larger projects than the current allocation provides. This would include code compliance, accessibility and safety related projects that may not require a building-wide renovation. Figure A shows the proposed allocation.

Figure A: Proposed Allocation of State Investment



About a third of the 2019 Governor's Recommended Budget for university capital was devoted to CIR, for a total of $65 million. Increasing that allocation to about half the total would allow more state funds to flow through the formula in support of the recommended focus. Doing so might also underscore the importance of incentivizing the institutions to plan ahead to address deferred maintenance needs.

Devoting a larger share of the state's investment to CIR would reduce the portion prioritized through the university capital rubric. Those projects are large scale and likely involve building-wide renovations along with new construction projects. Under this recommendation, policymaker involvement in that prioritization process would continue.

A comparison of projects that flow through the CIR formula versus those that would flow through the capital rubric is included in figure B.

Figure B: Comparison by Type of Project

Component	CIR Projects	Rubric Projects
Bondable?	Yes	Yes
Involves Renewal and Improvement?	Must Involve	May Involve
Cost Structure?	Lower cost projects	Higher cost projects

Who decides?	Universities determine specific projects consistent with bond requirements	Each project must be specifically authorized by the Legislature
Funding distributed?	Legislature determines total funding amount; Funding is then distributed via formula	Funding is appropriated by project

3) The Pursuit of Process Improvements

The SCDP analysis included a survey of other states' processes. Over 80% of those surveyed indicated that a facilities inventory was required followed by a facilities condition assessment and a classroom utilization study. With that in mind, the state could phase in the requirement of a facilities inventory and other relevant institutional information in order to be eligible for the receipt of state capital funding. A more robust collection of existing facilities inventory and current utilization data will allow for a better understanding of capital needs. Without quality data, updated consistently, policy makers will lack much needed decision support.

In conclusion, we believe this prioritized list is the first, tangible outcome of the strategic capital development plan and the start of a much-needed conversation related to the scope of public university capital needed to support the state's goals. We also believe the list appropriately underscores the need to focus state investment on replacement, renewal and repair of existing capital assets. Moreover, the policy recommendations outlined above are an appropriate compliment to the prioritized list and should be considered thoughtfully.

Thank you for your continued support of Oregon higher education.

Sincerely,

David Rives
Chair

Attachment – List of Prioritized Projects

HIGHER EDUCATION COORDINATING COMMISSION
255 Capitol Street NE, Salem, OR 97310
www.oregon.gov/HigherEd

HIGHER EDUCATION COORDINATING COMMISSION
December 12, 2019
Docket Item #: 11.1

Docket Item

Career and Technical Education and the *Strengthening Career and Technical Education for the 21st Century Act* (2018) (Perkins V)

Summary

Career and Technical Education (CTE) is a crucial part of the mission and work of Oregon community colleges. CTE prepares college students to enter the workforce in a wide variety of in-demand professions or advance their careers with the latest skills and information in their field. The passage of recent federal legislation (Strengthening Career and Technical Education for the 21st Century Act, also known as Perkins V) requires a CTE State Plan be submitted and performance indicators be identified.

Why CTE is important in postsecondary education

One of the many ways community colleges respond to the needs of their local and regional employers is by building CTE programs that address job openings and industry projections in their immediate area. CTE programs must remain nimble and responsive to ever changing industry needs. This requires programs to stay engaged with industry professionals, frequently update equipment and corresponding curriculum. The constant evolutionary offerings of community colleges allows them to remain in alignment with workforce demands and thus contribute to the economic development of their local communities.

CTE Postsecondary Concentrator:

A student who has completed 18 or more program credits, of which 9 or more are CTE core program credits

30

Average age of CTE Postsecondary Concentrator

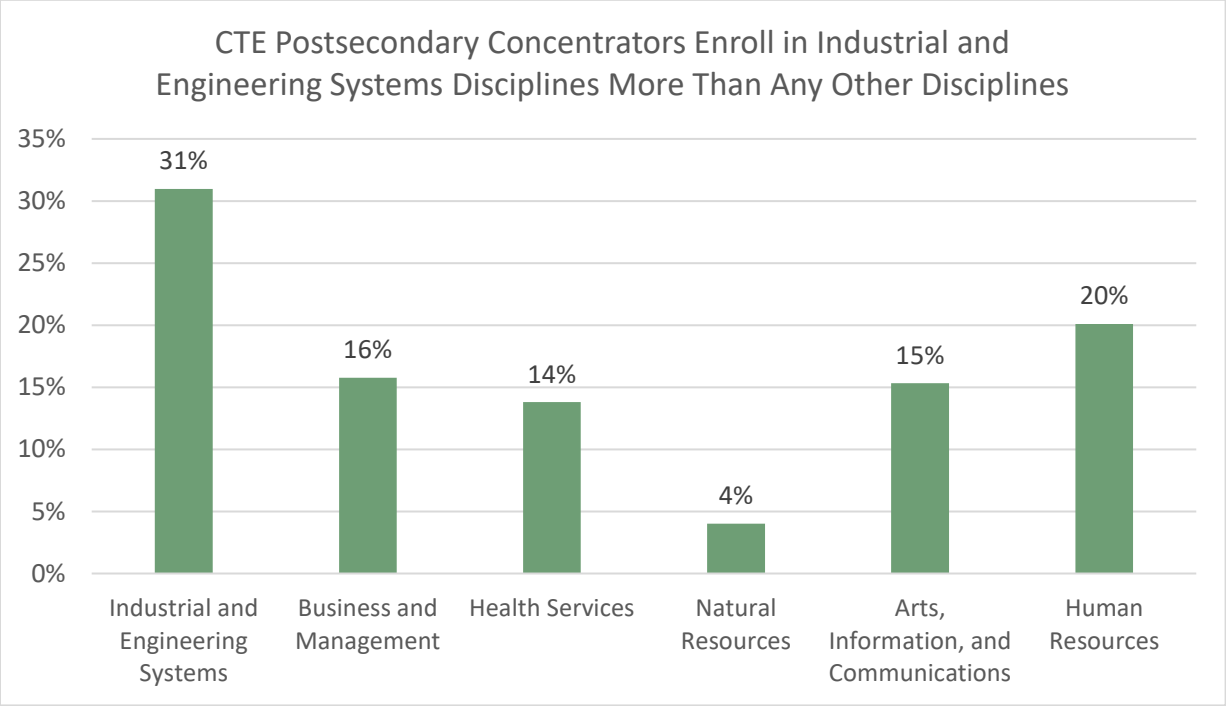
26,930 CTE Postsecondary Concentrators in 2018-2019; 56% male, 41% female, 3% unknown

Source: HECC analysis of community college student-level Perkins data; 2018-19 program year.

CTE in Community Colleges

CTE students make up approximately 28% of the student population in Oregon's community colleges. Degree and certificate seekers have a wide variety of CTE disciplines and programs to choose from in six career/technical categories:

- Industrial and Engineering Systems, which includes welding, manufacturing, automobile/diesel, computer information systems, construction/building trades, among others
- Business and Management, which includes accounting, computer applications, marketing, hospitality/tourism, administrative office, among others
- Health Services, which includes dental hygiene, nursing, radiography/diagnostic imaging, health information systems, medical assisting, lab technology, emergency medical services, among others
- Natural Resources, which includes geographic information systems, viticulture, agriculture, forest resources and environmental programs, among others
- Arts, Information and Communications, which includes sound engineering, photography, digital media and web design, interior design and integrated media, among others
- Human Resources, which includes criminal justice/law enforcement, fire science, mental health, addiction studies, early childhood education, and paralegal, among others



Source: HECC analysis of community college student-level Perkins data; 2018-19 program year.

The history and partnerships between ODE and HECC in the Perkins grant

A Federal Funding Historical Timeline:

Year	Legislation
1917	Smith-Hughes Act of 1917 was the first authorization for the Federal funding of vocational education (now known as career and technical education"
1973	Vocational Act
1984	Carl D. Perkins Act (Perkins I)
1990	Perkins Act was reauthorized as the Carl D. Perkins Vocational and Applied Technology Act (Perkins II)
1998	Reauthorization of Act occurs as Carl D. Perkins Career and Technical Education Act of 1998 (Perkins III)
2006	Carl D. Perkins Career and Technical Education Act of 2006 (Perkins IV).
2018	Strengthening Career and Technical Education for the 21st Century Act (2018) (Perkins V)

The HECC Office of Community Colleges and Workforce Development (CCWD) and the Oregon Department of Education (ODE - K-12 education) have a long-standing partnership in implementing various iterations of the Perkins Grant. This partnership has included a commitment to smoothing the transitions from high school CTE programs to college CTE programs, where learners can attain the certificates and/or degrees necessary to enter into their chosen workforce field. Many of these partnerships include accelerated learning options, which allow students to earn college credits while they are still in high school.

Making the most of the opportunity to innovate CTE in the state, ODE and CCWD contracted with Advance CTE and the Association for Career and Technical Education (ACTE) to facilitate the Perkins V planning and implementation process, and broader CTE systems improvement. In spring 2019, a needs assessment was conducted to identify the strengths, gaps, and areas needing improvement in the Oregon CTE system. While the needs assessment identified numerous strengths of CTE in Oregon, it also identified areas of improvement where engagement could be strengthened, including

- Work-based learning;
- Career guidance and development (particularly for younger students);
- Local program of study processes and improvement;
- Statewide secondary-postsecondary alignment, supported by increased postsecondary funding; and
- Data and accountability.

In an effort to leverage Perkins V, while addressing these areas of improvement and carry out the recommendations outlined in the needs assessment, Advance CTE and ACTE created an action plan that outlined the key Perkins V activities and considerations. ODE, CCWD, Advance CTE, and ACTE facilitated multiple stakeholder workgroups focused on Data and Accountability, Program Approval and Review, Work-based Learning, and Career Awareness and Exposure to address key decision points in Perkins V and consult on the development of accountability indicators and performance targets. ODE and CCWD continues to conduct intensive and inclusive stakeholder engagement through multiple vehicles during the planning process, including the development of a plan for maintaining stakeholder engagement throughout Perkins V implementation, once the State Plan has been submitted.

Quality CTE Programming through Statewide Frameworks

One of the changes that Perkins V will bring is the expansion of statewide programs. Currently, ODE has a statewide organization for secondary and postsecondary in Agriculture and CCWD has several statewide degrees and certificates. ODE and CCWD plan to expand Statewide Frameworks into the other CTE career areas to build clearer and more consistent pathways through secondary, postsecondary and into the workplace. These optional programs will create:

- Statewide engagement with business & industry on common skills and standards, as well as maps of employment and work-based learning opportunities
- Statewide pathway maps for post-secondary training to help guide learners
- Coordinated professional learning opportunities & resources in career areas
- Facilitated tribal consultation and involvement

Oregon's Secondary Quality Indicator: Work-based Learning (WBL)

While program data and reports are still the primary means of reporting program quality, ODE and CCWD identified a need for more youth and adults to be involved in learning that directly affects their ability to participate in living wage careers. Work-based Learning (WBL) was chosen as the secondary quality indicator that programs will be required to report in Perkins V. The intended outcomes of a focus on WBL are:

- Students will have greater access to sustained interaction with business and industry
- Students will have opportunities to experience the world of work and flexibly earn credit
- Statewide and regional support will exist for creation and implementation of WBL

While Oregon has chosen Work-based Learning as the federally reported secondary quality indicator, ODE and CCWD will be developing an approach that additionally includes indicators related to Industry Recognized Credential completion and College Credit while in High School.

Postsecondary Concentrator Definition and Performance Indicators

The Perkins V legislation defines a postsecondary CTE concentrator as a student who as earned at least 12 credits within a career and technical education program or program of study; or completed the program if it is fewer than 12 credits. As recommended by the Data and Accountability stakeholder workgroup, Oregon has proposed the following definition (additional language italicized in red).

> A student who has earned at least 12 credits*, of which 9 program credits are CTE specific,* within a career and technical education program or program of study; or completed the program if it is fewer than 12 credits; *or who as completed a career and technical education award of more than 45 credits (or Career Pathways Certificate).*

Perkins V requires annual reporting of three performance indicators at the postsecondary level: Postsecondary Placement, Recognized Postsecondary Credential, and Nontraditional Program Concentration. The Postsecondary Placement indicator measures the percent of CTE concentrators who remain enrolled in postsecondary education, are in advanced training, military service, a service or volunteer program, or are placed or retained in employment. The Recognized Postsecondary Credential indicator measures the percentage of CTE concentrators who receive a recognized postsecondary credential during participation in, or within one year of, program completion. Lastly, the Nontraditional Program Concentration indicator measures the percentage of CTE

concentrators from underrepresented gender groups who participate in CTE programs that lead to nontraditional fields for that specific gender group.

HECC Strategic Goals

The HECC's current strategic goals of student success, equity, and affordability through streamlining learner pathways are supported by the work of postsecondary CTE. From increased high school graduation rates to the intentional disaggregation of program data to reveal any differential impact on a variety of student groups, the work that is undertaken at both the secondary and postsecondary levels strives to reach those students who have been traditionally underserved and provide them access and pathways to completion. One of the foundations of CTE is the Program of Study (POS). A POS is an alliance between at least one high school and a community college to coordinate CTE programs in such a way that students leaving high school with credits in a CTE discipline enter directly into the community college CTE program. A POS requires that industry be involved in all phases of the program, from the initial planning to the ongoing advising and support.

48%

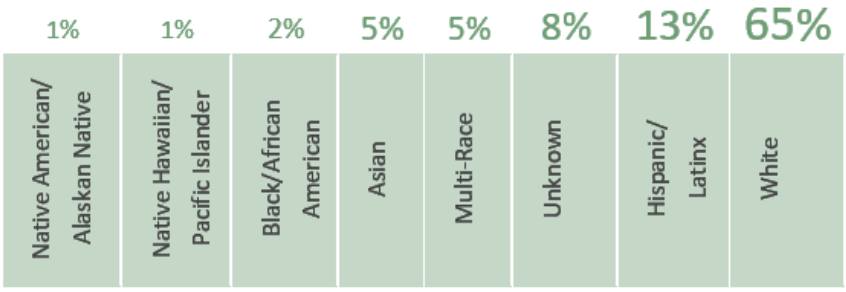
CTE Postsecondary Concentrators are economically disadvantaged

11%

CTE Postsecondary Concentrators are in a field that is nontraditional for their gender

Source: HECC analysis of community college student-level Perkins data; 2018-19 program year.

Hispanic/Latinx is the largest underrepresented group among CTE Postsecondary Concentrators



Source: HECC analysis of community college student-level Perkins data; 2018-19 program year.

Perkins V State Plan Timeline

In response to the signing of the federal legislation in July of 2019, CCWD has been actively engaged in the planning and steps necessary to implement the new law. These efforts are summarized below:

Date	Action
10/14/2019 - 11/26/2019	Draft elements of the CTE State Plan available for public feedback and public meetings
10/14/2019	Draft performance measures available for 60-day public comment
10/17/2019	Presentation of draft performance measures to the State Board of Education (informational & input)
1/16/2020	Draft CTE State Plan presented to the State Board of Education (First Reading) (informational & input)
1/16/2020	CTE State Plan available for Public Comment
2/5/2020	Submit State Plan to Governor for signature
3/19/2020	Second Reading and adoption of CTE State Plan by the State Board of Education (approval & adoption)
4/12020	Submit State Plan to Secretary of Education for Federal Approval
7/1/2020	Full implementation of Perkins V

Staff Recommendation

This is an informational and discussion item only.

HIGHER EDUCATION COORDINATING COMMISSION
255 Capitol Street NE, Salem, OR 97310
www.oregon.gov/HigherEd

Docket Item:

STEM Council Legislative Report

Summary:

Under ORS 326.500, the STEM Investment Council is required to submit an annual report to the State Board of Education, Higher Education Coordinating Commission, and Legislative Assembly on progress made toward achieving Oregon's STEM education goals, and on state investments in STEM education.

ORS 326.500 sets forth the following STEM education goals for Oregon:

1) Double the percentage of Oregon's students in 4th and 8th grades who are proficient or advanced in mathematics and science by 2025.
2) Double the number of Oregon's students who earn a postsecondary STEM degree or credential by 2025.

The STEM Investment Council's statutory functions are to:

1) Assist the State Board of Education and HECC in developing and overseeing a long-term strategy to advance Oregon's target outcomes around STEM education.
2) Advise the Superintendent of Public Instruction and Executive Director of the HECC on the administration of the state's investments in STEM education, including grants for the Regional STEM Hub Network and STEM Innovation grants.
3) Submit an annual report to the State Board, HECC, and Legislative Assembly on progress on Oregon's STEM education goals and the state's investments in STEM education.

The Council also provides guidance to the Regional STEM Hub Network, encourages collaboration between education and business & industry, and raises awareness and understanding of STEM education in the education sector, business & industry, and the broader public.

To achieve Oregon's statutory STEM education goals and implement the state's strategy for STEM education, in the 2017-19 biennium, the Legislative Assembly invested approximately $4.8 million in the Regional STEM Hub Network, and approximately $4.6 million in STEM Innovation Grants.

The Regional STEM Hub Network comprises 13 STEM Hubs throughout the state. STEM Hubs are multi-sector partnerships linking P-20 educators, schools, school districts, and education service districts to business and industry, CTE regional coordinators, workforce development, economic development and community-based organizations.

STEM Innovation Grants are designed to expand the implementation of effective programs related to STEM education, and to test out innovative approaches or programs that transform the way our students learn and improve student outcomes. Funded projects must specify how the program or project will serve a significant number of underserved and underrepresented students and, if proven successful, how the approach will be brought to scale across the state and sustained beyond the term of the grant.

The attached report includes:

- The most recent available data on Oregon's statutory STEM education goals, and plans to identify additional, meaningful metrics to measure progress and success.
- A summary of the STEM Investment Council's work in 2019 and its plans for the 2019-21 biennium.

- Impact data for the Regional STEM Hub Network and information on individual STEM Hubs' work in the 2018-19 school year.
- A summary of the outcomes of the 2017-19 STEM Innovation Grants and an introduction to the 2019-21 STEM Innovation Grants.

Materials:

STEM Investment Council Annual Report to the Legislative Assembly – December 2019.

Staff Recommendation:

Staff recommends the Commission approve the STEM Council Legislative Report for submission to the Legislative Assembly.

HIGHER EDUCATION COORDINATING COMMISSION

STEM Investment Council Annual Report to the Legislative Assembly

December 2019

INTRODUCTION

This report fulfills the STEM Investment Council's obligation under ORS 326.500 to submit an annual report to the State Board of Education, Higher Education Coordinating Commission and the Legislative Assembly on progress made toward achieving Oregon's STEM education goals and on state investments in STEM education.

In 2019, the STEM Investment Council focused its efforts on a) evaluating the results of the 2017-19 STEM Innovation Grants, b) working with the Department of Education (ODE) and Regional STEM Hub Network to develop a slate of STEM Innovation Grant projects for the 2019-21 biennium, and c) reviewing the current STEM Education Plan and preparing for the revision process in 2019.

This report includes:

- The most recent available data on Oregon's STEM education goals, as set forth in statute, and plans to identify additional, meaningful metrics to measure progress and success.
- A summary of the STEM Investment Council's work in 2019 and its plans for the 2019-21 biennium.
- Impact data for the Regional STEM Hub Network and information on individual STEM Hubs' work in the 2018-19 school year.
- A summary of the outcomes of the 2017-19 STEM Innovation Grants and an introduction to the 2019-21 STEM Innovation Grants.

STEM EDUCATION GOALS

LEGISLATIVELY MANDATED GOALS

ORS 326.500 sets forth the following STEM education goals for Oregon:

1) Double the percentage of Oregon's students in 4th and 8th grades who are proficient or advanced in mathematics and science by 2025.
2) Double the number of Oregon's students who earn a postsecondary STEM degree or credential by 2025.

These goals are highly ambitious. For example, in 2019, Minnesota had the highest percentage of students scoring proficient or above on the mathematics National Assessment of Educational Progress at 53 percent.[1] Doubling Oregon's percentage of students in the 2018-19 school year scoring proficient or above on its statewide mathematics assessment would mean 76.6 percent of students scoring proficient or better – a far higher percentage than the best performing state in the nation.

Furthermore, as we know, true system-wide change takes time, enormous effort, accountability, and sustained investment. Each year, the 13 regional STEM Hubs are impacting more and more students, educators, administrators, and districts, transforming learning through career-connected, interdisciplinary, applied instruction and content. While we don't expect to see significant gains in statewide assessment results from these STEM education efforts yet, we are confident that, with meaningful investment and support, these efforts will move the needle. To get there, the state needs real commitment from state agencies, STEM hubs, school districts, schools, business & industry, and other stakeholders to implement Oregon's STEM Plan.

The following tables show the percentage of Oregon students performing proficient or above on statewide 4th and 8th grade mathematics and 5th and 8th grade science assessments[2][3] and the number of postsecondary STEM degrees and credentials earned at Oregon public community colleges and universities.[4]

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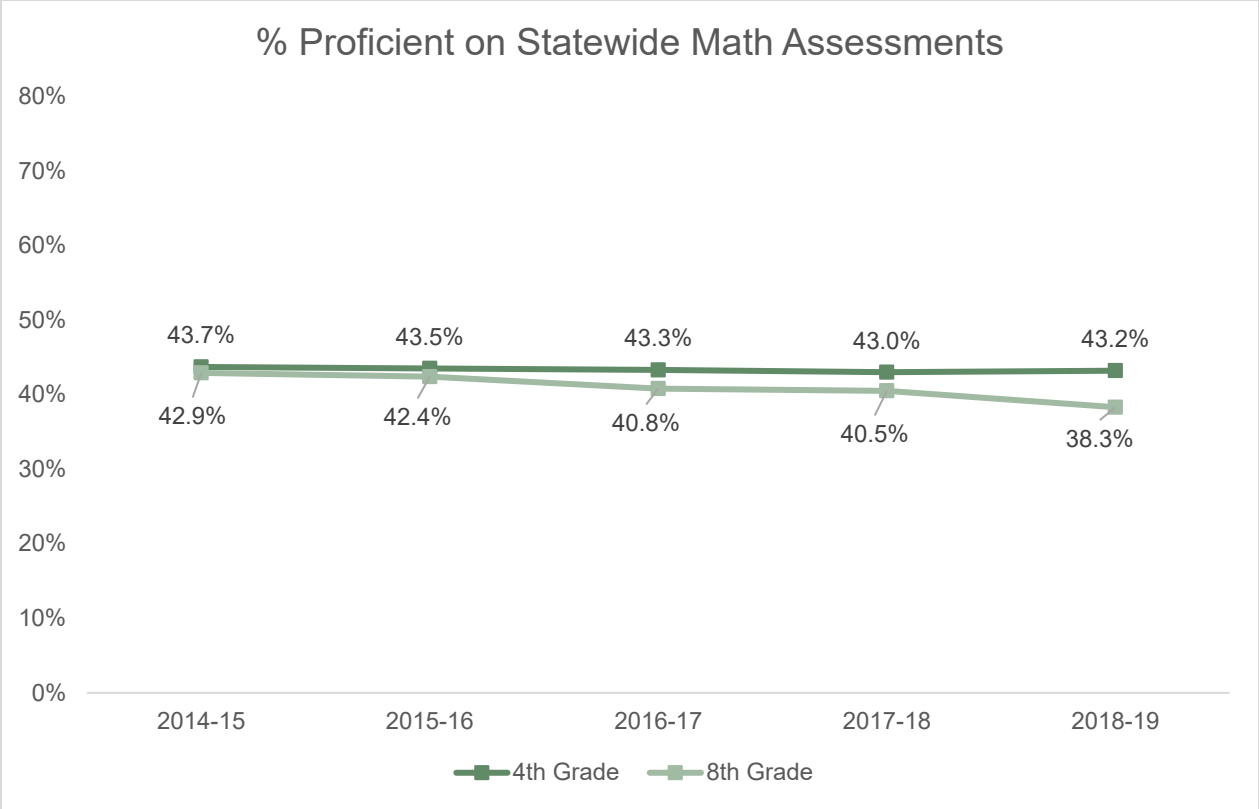
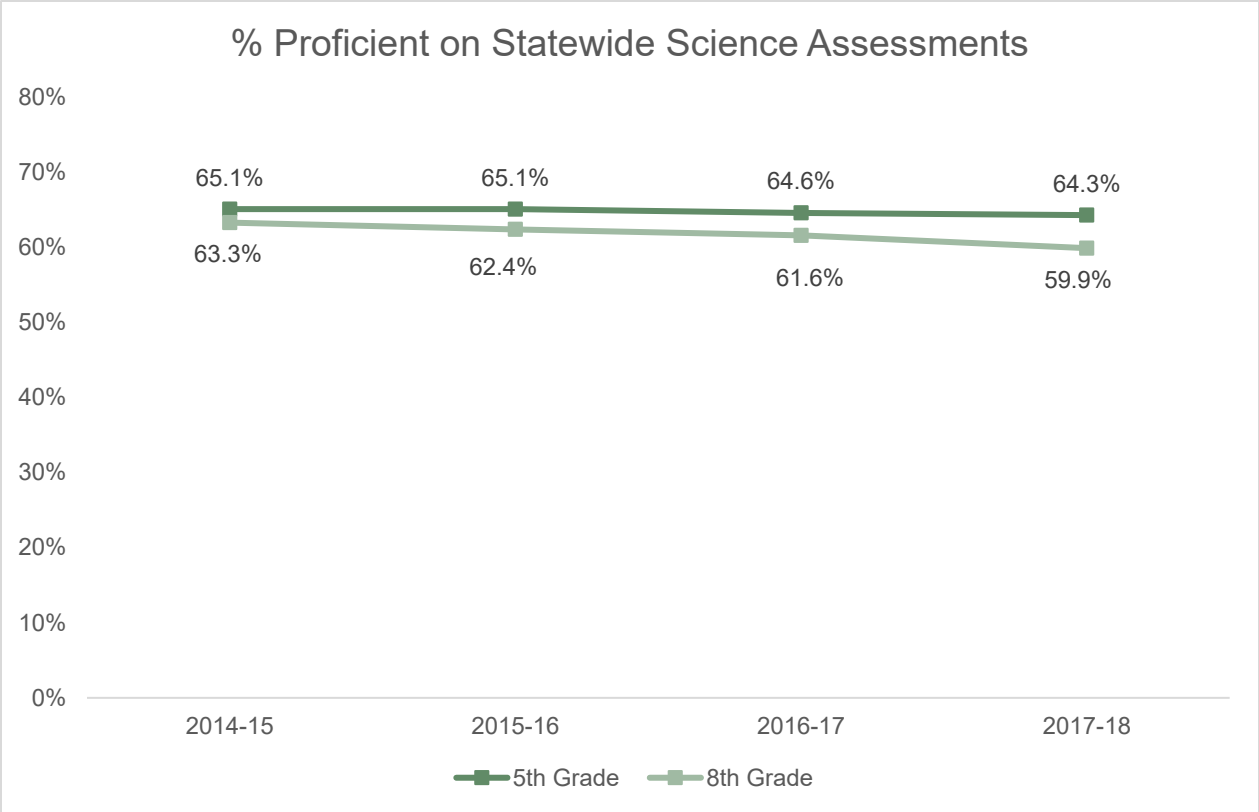
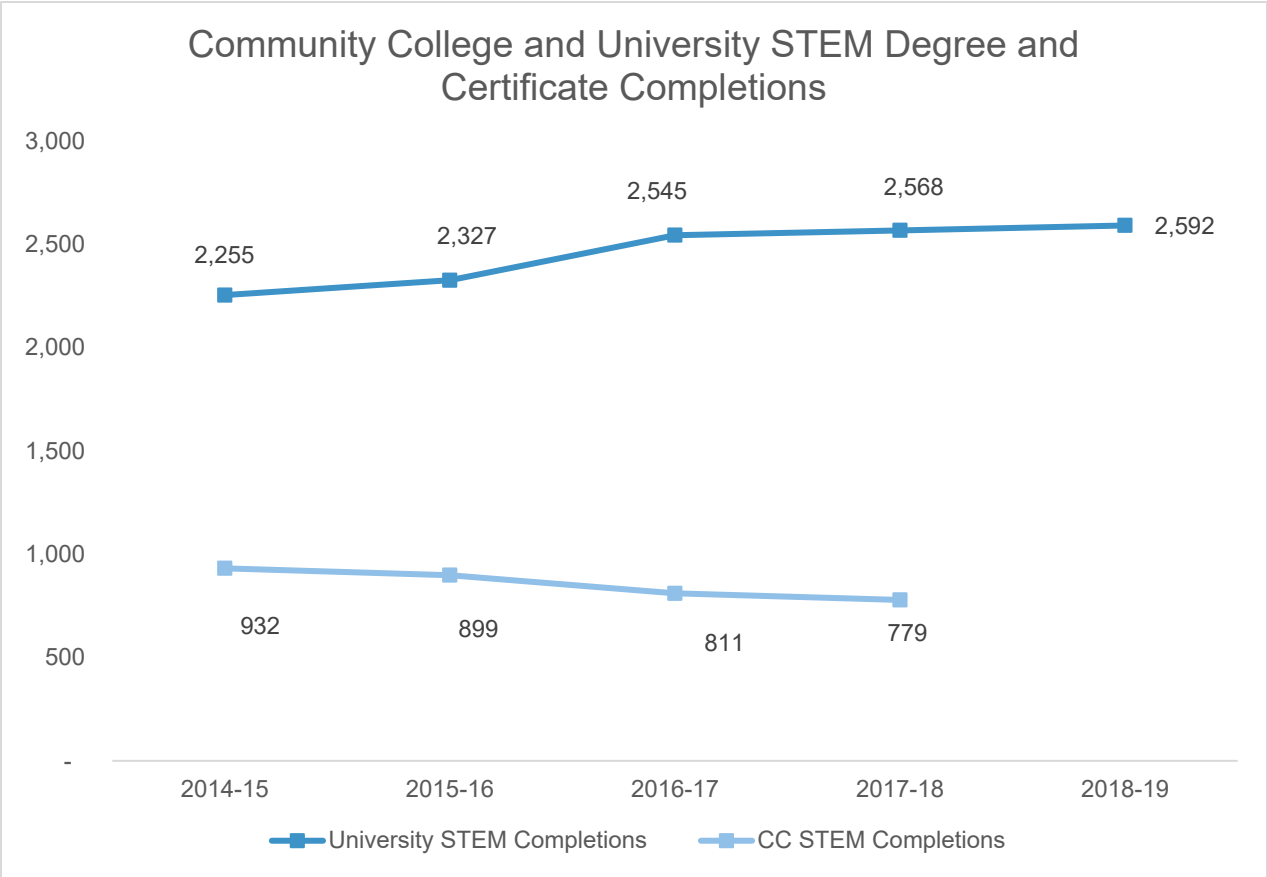
[1] The Nation's Report Card, https://www.nationsreportcard.gov/mathematics/states/achievement/?grade=4
[2] Oregon Department of Education
[3] Statewide science assessments are administered in 5th grade, not 4th grade.
[4] Higher Education Coordinating Commission, Office of Research & Data


% Proficient on Statewide Math Assessments
80%
70%
60%
50%
40%
30%
20%
10%
0%
43.7%
43.5%
43.3%
43.0%
43.2%
42.9%
42.4%
40.8%
40.5%
38.3%
2014-15
2015-16
2016-17
2017-18
2018-19
4th Grade
8th Grade


% Proficient on Statewide Science Assessments
80%
70%
60%
50%
40%
30%
20%
10%
0%
65.1%
65.1%
64.6%
64.3%
63.3%
62.4%
61.6%
59.9%
2014-15
2015-16
2016-17
2017-18
5th Grade
8th Grade



IDENTIFYING MORE MEANINGFUL GOALS AND METRICS

Recognizing that statewide assessments are blunt, far from perfect indicators of the impact of the Regional STEM Hub Network, in 2019, the STEM Investment Council and Regional STEM Hub Network, in partnership with ODE, began the work of identifying additional meaningful goals and metrics. This work will be a central focus of the Council and Hub Network in 2020, with the goal of completing a STEM "data dashboard" for Oregon.

STEM INVESTMENT COUNCIL

HISTORY, VISION, AND COMPOSITION

History and Purpose

In 2013, the Legislative Assembly passed and Governor Kitzhaber signed into law House Bill 2636, which, among other things, established the STEM Investment Council. The council's statutory functions are to:

1) Assist the State Board of Education (State Board) and HECC in developing and overseeing a long-term strategy to advance Oregon's target outcomes around STEM education.
2) Advise the Superintendent of Public Instruction and Executive Director of the HECC on the administration of the state's investments in STEM education, including grants for the Regional STEM Hub Network and STEM Innovation grants.

3) Submit an annual report to the State Board, HECC, and Legislative Assembly on progress on Oregon's STEM education goals and the state's investments in STEM education.

The Council also provides guidance to the Regional STEM Hub Network, encourages collaboration between education and business & industry, and raises awareness and understanding of STEM education in the education sector, business & industry, and the broader public.

An Equitable Vision for STEM Education in Oregon

The STEM Investment Council established the following vision for STEM education in Oregon:

"Reimagine and transform how we educate learners in order to enhance their life prospects, empower their communities, and build an inclusive, sustainable, innovation-based economy. Oregonians of all races, economic status, and regions will develop the fundamental STEM-enabled skills and mindsets necessary to:

- Improve the prosperity of all individuals and communities across the state
- Become creative life-long learners who can adapt to changing social and economic conditions
- Fully contribute to an increasingly complex and technologically rich global society
- Address high-demand, competitive workforce and industry needs"

The Council is committed to seeing its vision – and the state's statutory STEM education goals – realized for all student populations – most especially, for students from underserved and underrepresented communities. We know that there are severe disparities across demographic groups in access to and success in STEM education, and, as a result, in representation in the STEM workforce. As we track progress on Oregon's STEM education goals and metrics, we must disaggregate the data by race/ethnicity, gender, socioeconomic status, rural/urban status, and any other demographic characteristic correlated with underrepresentation in STEM fields. The state, led by the Regional STEM Hub Network, must employ targeted strategies to shrink opportunity and attainment gaps in STEM. The Council believes that closing these gaps is both a moral and economic imperative.

Composition

The STEM Investment Council is business-driven, comprising nine voting members from the private sector, jointly appointed by the Superintendent of Public Instruction and Executive Director of the HECC. The Council is also to recruit additional non-voting members from K-12 and postsecondary education, may recruit non-voting members from additional stakeholder groups, and may establish advisory and technical committees.

STEM? STEAM? What does it all mean?

As required by statute, the STEM Education Plan uses "STEM." However, the Council believes that, for the purposes of the Plan, "STEM" can be viewed as synonymous with the other terms, such as STEAM, STREAM, STEMM, METS, i-STEM, e-STEM, TEAMS, S2 TEM, MESHT, etc. Oregonians generally agree on the fundamental principles and values put forward in the STEM Manifesto. These ideals strive to communicate a vision of STEM education through which we ignite an inclusive renaissance of curiosity, creativity, wonderment, innovation, and the joyful pursuit of life-long learning and talent discovery. In this light, STEM can be viewed as "applied curiosity"—the insatiable desire to know and wonder, coupled with a creative drive to make, invent, and contribute to the betterment of humanity.

EXPANDED MEMBERSHIP PLAN

In 2019, the STEM Investment Council developed a plan for recruiting new members – voting and non-voting – to join the council in 2020, if approved by the Superintendent of Public Instruction and Executive Director of the HECC. At the beginning of 2020, several voting members of the STEM Investment Council plan to cycle off. These members have been on the Council since its establishment and recognize the value in allowing other business leaders to play a leading role on STEM education in Oregon. In its recruitment of new members, the Council was intentional about ensuring a diversity within its membership, especially across Oregon's growth STEM industries, but also in terms of race/ethnicity, gender, geographic location, and rural vs. urban communities.

In addition to the transitions among the Council's voting members, in 2020, the Council will have a host of new, non-voting advisory members. The council knows that all stakeholder groups – and particularly educators and school administrators – provide invaluable insight on STEM education policy, strategy, and investments. In 2020, new council members will include a K-12 educator, school administrator, and district administrator, and representatives of community colleges, universities, community-based organizations, and other regional collaboratives.

STEM EDUCATION PLAN 2.0

In its initial years of existence, the STEM Investment Council developed Oregon's first STEM Education Plan. The Council completed that plan in November of 2016 with Governor Brown's endorsement. It set forth the following four, overarching goals:

1) Inspire and empower our students to develop the knowledge, skills, and mindsets necessary to thrive in a rapidly changing, technology rich, global society.
2) Ensure equitable opportunities and access for every student to become a part of an inclusive innovation economy.
3) Continuously improve the effectiveness, support, and number of formal and informal P-20 STEM educators.
4) Create sustainable and supportive conditions to achieve STEM outcomes aligned to Oregon's economic, education, and community goals.

The inaugural STEM Education Plan introduced a sweeping, comprehensive vision of the future of Oregon's education system – a system predicated on STEM education principles and practices.

In 2019, the Council held several work sessions to review and comment on the current version of the STEM Education Plan. The Council determined that the next iteration of the plan will be more focused and actionable, and will include specifics around accountability for achieving the goals set forth in the plan. In particular, the Council believes that assigning roles and responsibilities to state agencies, STEM Hubs, school districts, schools, and other key stakeholders is critical to achieving the STEM Education Plan's vision and realizing Oregon's STEM goals. These entities must feel ownership over the STEM Education Plan and its components in order for systemic change to occur.

Furthermore, the Council was clear that any new iteration of the STEM Education Plan must continue to focus the state's efforts on serving the students who face the greatest barriers to a future in STEM.

Much must be done to achieve Oregon's statutory goals and the vision set forth in the original STEM Education Plan, but, with limited resources and capacity within Hubs, schools, and school districts, the Council must determine which initiatives, programs, and policies are most critical in the near term, and who is responsible for their implementation. In 2020, the council will undergo a comprehensive revision of the STEM Education Plan.

STEM INNOVATION GRANTS

The STEM Investment Council recommends to ODE the projects it believes should be funded by STEM Innovation Grants. The council receives regular reports on these projects throughout the biennium.

For the 2017-19 biennium, ODE adopted the council's recommendation to continue funding for three projects funded in the 2013-15 biennium: Math in Real Life, Digital Literacy & Computer Science, and STEM Beyond School. For the 2019-21 biennium, the council recommended a slate of new STEM Innovation Grant categories, which ODE accepted. Additional information about the 2017-19 and 2019-21 STEM Innovation Grants is included later in this report.

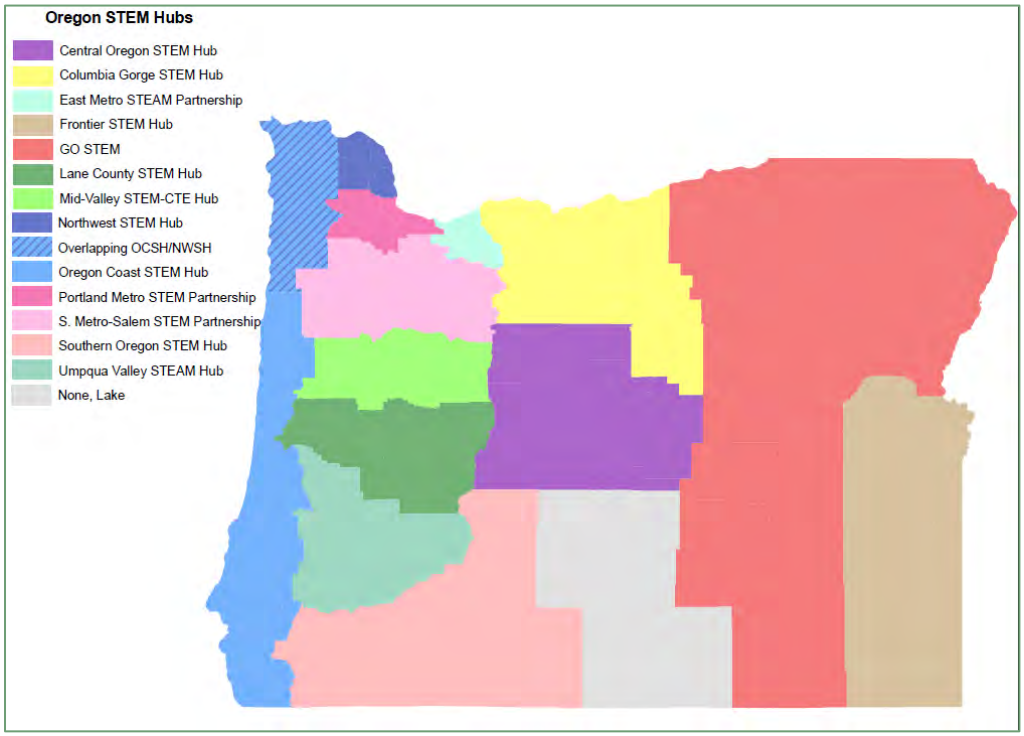
REGIONAL STEM HUB NETWORK

Oregon's Regional STEM Hub Network comprises 13 STEM Hubs throughout the state. STEM Hubs are multi-sector partnerships linking P-20 educators, schools, school districts, and education service districts to business & industry, CTE regional coordinators, workforce development, economic development and community-based organizations.

Hubs devise local solutions to meet local needs by coordinating regional communication and partnerships, improving student outcomes, building capacity and sustainability for change, and encouraging and supporting local and statewide engagement. Through their coordination and alignment work, Hubs increase efficiency in the system.

The Network began with six Hubs and has since expanded to 13. In the 2013-15 biennium – the first biennium in which the Regional STEM Hub Network received state funding – the Network received $2.7 million. The Network received roughly $4.8 million for the 2019-21 biennium. Though the size of the Network has more than doubled, the funding has not kept up.

A snapshot of each hub can be found below in Appendix A.



2017-19 BIENNIUM DATA[5]

STEM Hub Impact Data	Value	Units
Number of educators who participated in Hub professional development or programs	5,414	Educators
Number of educator hours spent in Hub professional development and programs	54,601	Educator Hours
Average number of professional development hours per educator	10	Hours
Projected number of students impacted by educator professional development participation	272,191	Students
Percent of students in Oregon impacted by STEM Hub professional development to their teachers	47%	% of students in Oregon
Number of industry volunteers who participated in Hub activities	3,294	Industry Volunteers
Number of industry volunteer hours	17,934	Industry Volunteer Hours
Number of students who participated in Hub directed programs	59,235	Students
Number of student hours in Hub directed programs	218,208	Student Hours
Estimate of students who benefit from equipment loaning programs	75,301	Students
Estimate of teachers who benefit from equipment loaning programs	1,230	Educators
STEM Hub Leveraged Funding		**$**
Grants and sponsorships (current biennium)		$2,603,562
Partner investments in Hub initiatives		$1,630,770
In-kind time and resources		$1,543,393
Funding and in-kind secured for future biennia		$3,110,702
Total		$8,888,427

PROJECT IMPACT

In an effort to build capacity within the STEM Hubs and their partners, ODE, in collaboration with the Ford Family Foundation, funded an opportunity for STEM Hubs and community partners to participate in a 10-month graduate-level learning experience called Project Impact, guided by Dialogues in Action. This allowed a deep dive into understanding the core work of utilizing impact evaluation to determine what's working and what needs to change. Seven of the 13 STEM Hubs participated, including Central Oregon STEM Hub, East Metro STEAM Partnership, Greater Oregon STEM Collaborative, NW STEM, Portland Metro STEM Partnership, Southern Oregon STEAM Hub, and Umpqua Valley STEAM Hub.

[5] Collected by the Regional STEM Hub Network

Two primary questions guided the evaluation:

1. What kind and quality of impact are Hubs having?
2. What is causing or contributing to the impact?

Each of the seven participating STEM Hub teams designed and implemented a mixed-method approach to data collection. For the qualitative inquiry, the teams designed interview protocols, identified a sample of interviewees using purposeful stratified sampling technique, collectively convened 85(+) in-depth interviews with educators and community partners, analyzed the data from the interviews, and developed themes from the entire data corpus. For the quantitative inquiry, the teams designed surveys that were deployed to educators and community partners.

Key findings show that the STEM Hubs are beginning to show impact in their regions:

1. Industry and education partners are excited at the opportunity to better **align educational strategies and industry needs.**
2. Many educators are recognizing the value and potential of **STE(A)M learning as a strategy for increasing equity** in STE(A)M fields and education as a whole, highlighting the relationship between the two.
3. Educators and partners are shifting their understanding of STE(A)M learning: rather than seeing it as an isolated group of subject areas, educators and partners are **beginning to see STE(A)M as a methodology** and an approach to learning and thinking.
4. Educators are **using STE(A)M methods and content across disciplines to model the interdisciplinary nature of STE(A)M** , integrating it into subjects such as reading, writing, and social studies.
5. STEM Hubs are giving educators the opportunity to **step into leadership roles as STE(A)M champions** , while working with formal leaders to redefine how they support STE(A)M education.
6. Educators reported **increased student engagement and improved attendance** when STE(A)M thinking principles were implemented.
7. Educators report that when engaged through STE(A)M based learning, students are more willing to think outside the box and work through hard problems **, encouraging growth mindset and student voice.**

The factors that contribute to these findings include:

1. Oregon STEM Hubs are fostering **a STE(A)M-focused support network, building confidence and inspiring collaboration** among educators and partners.
2. **Professional development opportunities are fostering a safe space for educators** to explore STE(A)M learning and grow their confidence and identity as STE(A)M educators.
3. By using a student-directed approach in classrooms, a major strategy in STE(A)M learning, **teachers are shifting their role to facilitating inquiry** rather than directly providing information and answers.

While implications and next steps vary across each STEM Hub, areas of common or shared work include the following:

1. Cultivating STE(A)M champions and leaders
2. Strengthening and showcasing equity efforts
3. Expanding high-level, practical professional development opportunities that build educator skills and knowledge related to classroom strategies, modeling, and cross-curricular/integration of STE(A)M
4. Improving community outreach, partner communication, and advocacy efforts
5. Better engaging formal leaders such as district administrators and community program directors
6. Deepening networking and partnership development, especially with industry, and
7. Identifying, sharing, and developing more resources to support this work

The Regional STEM Hub Network intends to develop a set of common metrics and supporting methodologies and tools. In addition, the Network hopes to continue to build its impact evaluation "muscle" in a second phase of work. While a primary focus of STEM Hubs is building educator confidence and greater connections with

community partners, including business & industry, Hubs' primary goal is to impact systems for lasting change. For true systemic change to occur, STE(A)M strategies and mindsets must be adopted across all learning environments, P-20 and formal & informal.

STEM INNOVATION GRANTS

STEM Innovation Grants are designed to expand the implementation of effective programs related to STEM education, and to test out innovative approaches or programs that transform the way our students learn and improve student outcomes. Funded projects must specify how the program or project will serve a significant number of underserved and underrepresented students and, if proven successful, how the approach will be brought to scale across the state and sustained beyond the term of the grant.

2017-19 GRANTS

Following the STEM Investment Council's recommendation, ODE continued funding for three major projects in the 2017-19 biennium with STEM Innovation Grants: Math in Real Life, Digital Literacy and Computer Science, and STEM Beyond School. These projects were originally funded by the 2013-15 STEM Innovation Grants. The Legislative Assembly funded STEM Innovation Grants at $4,430,000 in the 2017-19 biennium.

Math in Real Life (~$1,350,000)
Math in Real Life (MiRL) supports the expansion of regional networks to create an environment of innovation in math teaching and learning. The focus on applied mathematics supports the natural interconnectedness of math to other disciplines while infusing relevance for students. MiRL supports a limited number of networked math learning communities that focus on developing and testing applied problems in mathematics. The networks help math teachers refine innovative teaching strategies with the guidance of regional partners and the Oregon Department of Education.

Outcomes of the 2017-19 Math in Real Life grant include:

- 183 high school and middle school teachers from 70 schools in 45 school districts participated in Math in Real Life professional development.
- The projects provided, on average, 42 hours of professional development per teacher which included lesson development, interaction with context experts, and externships.
- 176 lessons were developed or refined as part of the professional development which directly impacted approximately 5600 students.
- Math in Real Life experiences were shared at two summer institutes held at Oregon State University, Confederation of Oregon School Administrators conference, the Northwest Math Conference, and the National Council of Teachers of Mathematics conference.
- 6 rural schools in northeast Oregon are piloting a high school math course that combines application with Mathematical Modeling. The course was developed and shared by the Ohio Department of Education.

Digital Literacy & Computer Science (~$750,000)
Digital Literacy & Computer Science supports the creation of a state plan for digital literacy and computer science education, as well as the development of a network of teachers who will produce and deliver long-term professional development leading to the creation of new CTE programs of study in computer science. The grant also supports the expansion of SuperQuest trainings – high quality professional development in digital literacy and computer science.

Outcomes of the 2017-19 Digital Literacy & Computer Science include:

- 567 unique educators participated in three-day SuperQuest trainings, benefiting an estimated 28,000 K-12 students in the coming years.

- Summer SuperQuest trainings were held in 29 of Oregon's 36 counties.
- 97% of educators found the SuperQuest training workshops "extremely valuable" or "very valuable."
- The majority of SuperQuest attendees – 57% – were first time attendees at a SuperQuest workshop.
- Prior to the SuperQuest trainings, attendees 76% reported their subject knowledge level as "not at all knowledgeable" or "slightly knowledgeable"; after the training 93% reported feeling "very knowledgeable" or "moderately knowledgeable."
- Prior to the SuperQuest trainings, 10% of attendees reported feeling "completely to very confident" in their ability to teach the subject content, that percentage increased to 61% after the 3-day training.
- The Computer Science Teacher Education Association's Fall and Spring Symposiums had over 242 participants from a wide range of sectors: high school educators, university and college faculty and administrators, industry experts and government representatives.

STEM Beyond School (~$1,200,000)
STEM Beyond School (SBS) works with local community providers across Oregon to offer 50 hours or more of engaging STEM programming for students in grades 3 through 8, with 70% or more participation by historically underserved students: students of color, students in poverty, students with disabilities, and English language learners. Program partners leverage out-of-school time to expand learning opportunities for students. SBS provides over 50 hours of professional development to participating educators to build capacity for STEM programming long term. SBS also formed and supports a statewide network of community-based out-of-school STEM learning providers.

Outcomes of the 2017-19 STEM Beyond School include:

- 1,590 youth participated in 73,678 hours of STEM programming and field trips.
- In the first year of the biennium, 87 percent of youth served by SBS were from historically underserved student populations (these data for the second year of the biennium are not yet available).
- Based on pre- and post-survey scores, the average youth participating in SBS maintained their STEM identity and motivational resilience over time.
- Based on pre- and post-survey scores, youth who initially had low-interest in STEM became more interested and engaged in STEM following participation in SBS.
- Developed a statewide network of out-of-school STEM providers.

In addition, ODE allocated approximately BLANK in funding from the STEM Innovation Grant funding stream to individual STEM Hubs for Hub-directed innovative projects and programming. These grants focused on:

- Efforts that increase cross-STEM Hub collaboration.
- Efforts that increase regional participation in the three STEM Innovation grant areas (Math in Real Life, STEM Beyond Schools, Computer Science and Digital Literacy).
- Efforts that increase time on science in elementary school.
- Efforts that increase Youth Voice in STEM Education.
- Efforts that increase communication of STEM education efforts.

2019-21 GRANTS

In the 2019-21 biennium, the Legislative Assembly continued funding for STEM Innovation Grants at current service level, or, $4,601,636. For the 2019-21 biennium, the STEM Investment Council recommended that the majority of STEM Innovation Grant funding be allocated to three new grant categories: School-wide STEM Transformation, STEM Leaders, and Innovative Programming. Projects in these categories must impact a significant number of students from underserved and underrepresented communities. They also must involve collaboration across two or more STEM Hubs in order to promote both regional and cross-regional partnership.

The Council recommended that the remaining funds be used to sustain the progress and success resulting from Math in Real Life, Digital Literacy & Computer Science, and STEM Beyond School.

If these projects – those newly funded and those being sustained – prove successful, the Council believes that ODE should fund their implementation statewide.

School-wide STEM Transformation Grants (~$900,000)
School-wide STEM Transformation grants use STEM education as the basis for lasting school-wide transformation at the elementary and middle school level. Many of Oregon's administrators and classroom educators already understand the power of STEM education and have created pockets of STEM excellence in their classrooms and schools. To ensure that these efforts reach beyond one administrator or educator – beyond a single classroom or one employee's tenure at the school – cultivating a school-wide STEM culture is necessary.

Participating Hubs will identify elementary and/or middle school partners that agree to undergo a rigorous transformation process that will include:

- Establishing STEM leadership teams at each participating school
- Participation by school leadership teams in a professional learning community
- Developing a STEM School rubric and designation process
- Developing individualized STEM transformation plans for each school
- Participating in sustained STEM professional development

STEM Leader Grants (~$1.1 million)
STEM Leader grants develop school and district administrator and teacher leaders who have a deep understanding of STEM pedagogy and STEM education's power to transform student outcomes. STEM administrator and teacher leaders will create the conditions for STEM integration in our elementary and middle schools, and make the goal of STEM integration become a reality.

Participating Hubs will:

- Provide a series of professional development opportunities to cohorts of elementary and/or middle school and district administrators and teacher leaders on topics including, but not limited to:
    - Equity in STEM
    - Integration of applied learning, project-based learning, problem solving, and inquiry into curricula
    - Integration of Next Generation Science Standards into curricula
    - Partnerships with industry and community-based organizations
    - Increasing time on science and math
    - System-change and school transformation
- Develop a network of STEM administrator and teacher leaders that will:
    - Provide STEM professional development to fellow administrators and teachers
    - Promote STEM education and shape STEM policy at the school, district, and state level
    - Identify and share STEM resources and best practices with the broader education community
    - Serve as a resource for pre-service teacher preparation programs

Innovative Programming Grants (~$1 million)
Innovative programming grants will expand regional implementation of innovative ideas related to the STEM Education Plan's goals. Projects under this grant category will focus on:

- Efforts that increase cross-Hubs collaboration
- Efforts that increase time on science in elementary school
- Efforts that increase youth voice
- Efforts that increase use of Oregon Connections
- Efforts that increase communication of STEM education efforts.

Sustainability Grants (~$1.6 million)
Sustainability grants support the continued operation, expansion, and evolution of successful projects and programs, while building capacity to sustain the work following the end of the grant term. The projects funded for the 2019-21 biennium include:

- Digital Literacy & Computer Science (~$700,000)
- STEM Beyond School (~$500,000)
- Math in Real Life (~$250,000)
- Oregon Connections (~$52,000)

CONCLUSION

In order to continue the Oregon's progress toward transforming our education system into a STEM ecosystem, the STEM Investment Council has developed the following work plan for the 2019-21 biennium:

1. **STEM Education Plan Update:** The Council will write the second iteration of the plan, creating a more focused and actionable document with specifics around accountability for achieving the goals set forth in the plan.
2. **STEM Data Dashboard:** The Council, in collaboration with ODE, HECC, and the Regional STEM Hub Network, will identify a set of metrics – beyond scores on standardized tests and postsecondary degree/credential production – to measure progress.
3. **STEM Innovation Grant Monitoring:** The Council will receive regular reports from ODE and the Regional STEM Hub Network on the 2019-21 STEM Innovation Grants.
4. **Regional STEM Hub Network Advising:** The Council will receive regular reports from the STEM Hub Network and will advise the Network to ensure alignment and efficiency.
5. **Policy Analysis and Development**: The Council will analyze Oregon's current policy related to STEM education – including general P-20 and CTE policy – and develop policy recommendations where needed.

Again, with limited resources and capacity, the Regional STEM Hub Network, with the support of ODE, HECC, and the STEM Investment Council, has had meaningful impact across the state. In order to make that impact systematic, however, the Council recommends increased investment in the Network and STEM programming, as well as in agency capacity to support his work.

APPENDIX A: REGIONAL STEM HUB FACT SHEETS

1. CENTRAL OREGON STEM HUB

Mission

The Central Oregon STEM Hub is a partnership connecting regional pre K-12 education, higher education, industry, and community partners to catalyze opportunities and exploration in science, technology, engineering, and math (STEM).

Vision

Through collaboration, Central Oregon STEM Hub partners prepare students to be critical thinkers, career-ready and college-bound students, and informed global citizens through integrated STEM opportunities in and out of the classroom.

Equity

Objective: Every Central Oregon student has access to and is engaged in high-quality STEM opportunities in and out of school.

Indicator: Number of STEM learning opportunities available across counties (formal and/or informal).

Indicator: Number of [historically underserved and underrepresented] students participating in out-of-school STEM experiences and programs.

School Systems

Objective: STEM learning is integrated and prioritized across grade-levels and addresses student barriers, fosters STEM fluency, and student achievement.

Indicator: Growth in time dedicated to STEM learning (measuring time spent in STEM).

Well-Lit, Aligned Pathways

Objective: Young people are aware and ready to enter STEM post-secondary opportunities and careers.

Indicator: Number of times kids have been exposed to STEM experiences.

Indicator: Number of STEM certificates and degrees earned [especially by underrepresented and nontraditional students].

Educator Development

Objective: Central Oregon educators engage students in high-quality integrated STEM learning.

Indicator: Educator confidence in teaching STEM.

Indicator: Educator STEM pedagogical and content knowledge.

STEM Identity & Engagement

Objective: Students are interested in and possess STEM knowledge and skills to succeed in a complex future.

Indicator: Number of students enrolled and completing MS/HS/Post-Secondary STEM Courses.

Indicator: Retention in STEM certificate and degree programs.

Indicator: Participation in out-of-school STEM experiences.

Sustained, Reciprocal Investments

Objective: A vibrant STEM ecosystem is part of Central Oregon's reputation and attracts industries and families to live, work, and learn here.

Indicator: Partners use regional assets and environments to spark interest in STEM.

Indicator: Number of business and industry partners engaged in the STEM Hub network.

2018-2019 HIGHLIGHTS BY INITIATIVE AREA

EQUITY	The Central Oregon STEM Hub has a focus on equity and creating programs that specifically serve marginalized and non-traditional populations. This year, equity training was intentionally embedded into all STEM Hub professional development and career-connected learning opportunities for students.
SCHOOL SYSTEMS	We cannot build a pipeline for industry or engaged students if we do not invest in our school systems to teach STEM principles. The Central Oregon STEM Hub is creating a mindset shift around STEM education, creating an environment that is less about the acronym and more about how we teach and learn. We made a concerted effort in conversation and in branding to remove the periods in the STEM acronym and focus on STEM as a way of teaching and learning through relevant hands-on problem solving.
EDUCATOR DEVELOPMENT	This past year we worked diligently to build our K-16 relationships, with 511 educators participating in HUB professional development or programs. We provided focused, content-specific trainings with the majority of the programming through some form of professional learning community. We measured a direct correlation of our safe professional learning space to an increase in confidence in the classroom as a STEM educator. Educators are more confident to embrace inquiry, wonder, and real-world learning at the heart of their practice.
WELL-LIT, ALIGNED PATHWAYS	Our relationships with Career Technical Education and our local workforce investment board align our priorities to local high growth, high demand STEM careers in the computer science, healthcare, advanced manufacturing, and construction fields. By providing career-connected learning opportunities for young people we exposed them to STEM options for post-secondary education and careers. Over 8,000 youth participated in STEM Hub programming this year.
STEM IDENTITY & ENGAGEMENT	We strive to build both STEM identity and confidence. Young people are encouraged to be makers, creators, doers, and thinkers in charge of their own learning. Youth voice and choice related to STEM experiences continue to expand as their STEM knowledge and skills increase. Regionally we are focused on gaps in STEM learning specifically related to increasing computer science and elementary science learning opportunities for our youth.
SUSTAINED, RECIPROCAL INVESTMENTS	The exponential growth in our region is fueling new educators, new students, and new industry partners. We continue to grow the awareness of STEM education in our community and the investment of local STEM business and organizational partners in their time, money and insight in our youth. Our STEM advocates gather and connect to inspire unexpected and transcendent STEM possibilities, and we logged 4,067 volunteer hours in STEM activities this year.

2. COLUMBIA GORGE STEM HUB

Columbia Gorge
STEM HUB
SCIENCE, TECHNOLOGY, ENGINEERING, & MATHEMATICS

The Columbia Gorge STEM Hub serves as a central point for communication & cooridnation for STEM Education (Science, Technology, Engineering, & Math).
We partner with a **regional network of schools, nonprofits, businesses, & civic leaders** working to increase STEM opportunities for all students in the Gorge.
Collectively we are striving to develop a career-ready, diverse, adaptable workforce.

WHO WE WORK WITH & SUPPORT:

- Students (PreK - college) & Families
- Educators
- Businesses & Nonprofits

In the counties of

- Hood River, Gilliam, Sherman, Wasco & Wheeler (Oregon)
- Klickitat & Skamania (Washington)

WE COLLABORATE WITH CROSS-SECTOR PARTNERS FROM EDUCATION, INDUSTRY, & NONPROFITS TO PROVIDE:

*"**STEAM Skills**...have become essential to fully participate in modern democratic society and **are the gateway to high-wage, high-demand jobs** that will drive Oregon's prosperity..."*
- Governor Kate Brown, STEAM Week 2018 Proclamation

The **Columbia Gorge STEM Hub** is one of a 13 member statewide STEM Hub Network, supported by the Oregon Dept of Education.

STEM JOBS ARE THE ECONOMIC DRIVERS IN OUR REGION:

3 OF THE 5 LEADING INDUSTRIES IN THE GORGE ARE STEM-RELATED

MANUFACTURING

HEALTHCARE

AGRICULTURE

OTHER TOP 2:

GOVERNMENT
HOSPITALITY/RETAIL

Christy Christopher, STEM Hub Director | 541-296-2046 | gorgestem@cgesd.k12.or.us | www.gorgestem.org

Significant Projects 2018-19

STUDENT PROGRAMS

CHIEF SCIENCE OFFICERS:

- National student leadership program supported by NSF. Collaboration with STEM Hubs in Eastern & Southern Oregon.

STEM NIGHTS:

- Hands-on family events at elementary schools to raise awareness of STEM Careers. Large impact (>1000 students/yr) & highly cost-effective.

MAKER CLUBS:

- Year-long curriculum developed by STEM Hub. Funded by national "US 2020" grant. 8 sites; 2,275 student impact hours.

OTHER EFFORTS INCLUDE:

- Family STEM Kits, Intro to Engineering events, and supporting partner events.

EDUCATOR SUPPORT

MICROGRANTS TO EDUCATORS:

- 19 innovative projects funded in 4 counties. Estimated students impacted: ~1,769
- >80% of students impacted come from at least one population underrepresented in STEM

OTHER EFFORTS INCLUDE:

- Annual STEM Symposium (teacher professional development), STEM Lending Library, and lesson plan archive.

REGIONAL COLLABORATION

GORGE STEM FAIR:

- Regional event bringing together businesses, schools, and local organizations to celebrate STEM in the Gorge.
- Financially self-sustaining (supported by sponsors) and large reach.

OTHER EFFORTS INCLUDE:

- Monthly newsletters, regular partner meetings, collaborative grants, networking events, and supporting partner events.

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3. EAST METRO STEAM PARTNERSHIP

East Metro STEAM Partnership: 2018-2019

Summary

The vision of the East Metro STEAM Partnership is an East Multnomah County community where children, youth, and adults have equitable access to and are engaged in Science, Technology, Engineering, Art, and Math (STEAM) learning that results in a skilled workforce and increased economic opportunity. EMSP focuses on the Eastern part of Multnomah County, a region representing 5 school districts, 43,000 students, 2,000 teachers, and the most diverse and economically challenged residents in the state of Oregon. Incomes are 68% higher in West Portland than East Portland and more than three times as many people hold college degrees in the west compared to the eastern part of the metropolitan area, according to the 2016 US Census, American Community Survey.

EMSP is governed by a Leadership Team consisting of community leaders in education, the trades, industry, and community organizations. At the direction of the Leadership Team, the Director convenes 50+ partners every other month, conducts an annual needs assessment, and serves as the point of contact for the region's STEAM efforts. In a distributed leadership model, four action teams comprised of committed partners (see image below), work together to move the region toward EMSP's vision.

Impact Data

- 95 educators received a total of 1,242 professional development hours, reaching an estimate of 30,402 students as a result.
- 146 students participated in EMSP-supported or EMSP-funded programs, resulting in 6,740 hours of STEAM.

eastmetrosteam.org landen.zemickow@mhcc.edu 973-978-1868

Selected Initiatives

Listening Sessions and STEM Equity Self-Assessment Tool [State STEM Plan Goal Area 1]

- The Equity and Empowerment Team, led by Co-Chair Bernard Rahming, held five listening sessions in three languages, reaching 43 people. The lessons learned from these sessions resulted in the development of a draft STEM Equity Self-Assessment Tool.

STEM Leadership Academy for Administrators [State STEM Plan Goal Areas 1-4]

- 10-month learning opportunity for elementary building principals and their supervisors to deepen their understanding of STEM teaching & learning, effective leadership models that support high academic achievement, and tools & resources to support their role.
- 22 administrators across six districts, served by three STEM Hubs: PMSP as lead, with support from EMSP and SMSP.
- More info: http://bit.ly/STEM-leadership-academy

Industry for a Day [State STEM Plan Goal Areas 1-3]

- In 2019, in collaboration with All Hands Raised, Worksystems, and Impact NW 220 educators visited 28 industry sites and experienced firsthand what jobs are available in the east metro area as well as what employers are looking for.
- Information from companies was compiled into a Company Overview Booklet. Attendees also indicated which actions they would follow up on over the course of the school year.

STEM Beyond School [State STEM Plan Goal Areas 1-3]

- Each site served 30 or more youth in grades 3-8 for at least 50 student hours. At least 70% of students were underserved. Staff participated in 70 professional development hours.
- Metropolitan Family Services hosted a site through its SUN School at West Powellhurst Elementary (David Douglas School District).
- Saturday Academy hosted a site through a winter and spring class at three locations located in Gresham-Barlow and Reynolds School Districts, as well as a spring break camp at Mt. Hood Community College.

Youth in STEAM Communications [State STEM Plan Goal Area 1]

- Collaboration in which Center for Advanced Learning digital media and design students set the strategy and creation of EMSP communications materials through paid internships at Lewis Creative and MetroEast Community Media
- Four students developed a brochures for industry, educators, and community members, and 4 video vignettes of EMSP target audiences interacting with STEAM: Charles Warrington, MicroChip, Anieanette Brown, Oregon Tradeswomen, Al McQuarters, Mt. Hood Community College, Aman Singh, City of Gresham.

Youth Advisory Council [State STEM Plan Goal Area 1]

- Youth Advisory Councils have taken place twice per year since spring 2017, engaging up to 15 youth age 13-20 from throughout the East Metro region, paying them to influence their peers by spreading information and activities about STEAM in their schools and community.
- More info: https://eastmetrosteam.org/youth-advisory-council/

4. FRONTIER STEM HUB

Our Mission

To support, develop, and promote quality Science, Technology, Engineering, and Math (STEM) education for all students of Malheur County to advance Oregon's 40-40-20 goal for students to achieve college and career readiness resulting in long-term economic growth and increased competitive and creative capacity for the region.

Our Vision

STEM education that inspires and empowers all learners to develop knowledge, skills, and mindsets necessary to adapt and contribute to and succeed in an increasingly complex and technologically rich society, building our shared prosperity and economic vitality.

FRONTIER STEM HUB

SCIENCE TECHNOLOGY ENGINEERING MATH

The Frontier STEM Partnership serves Malheur County, a large geographic and rural region. The students and districts Frontier STEM serves often face challenges resulting from geographic isolation and limited availability of services, opportunities, and resources. The young people of Malheur County also face challenges associated with the second highest child poverty rate in the state at 37% compared to Oregon's average of 19%. Poverty can limit a child's social, educational, and personal development due to reduced access to opportunities.

The Frontier STEM Hub leverages the work of diverse partners and collective impact to create innovative solutions to overcome these challenges and reduce barriers.

To achieve their vision, Frontier STEM Partnership has identified the following four goals:

1. Support, develop, and promote formal and informal STEM-learning opportunities, increasing exposure and interest of P20 students to increase proficiency, interest, and attainment of post-secondary credentials and degrees in STEM and CTE
2. Continuously improve the effectiveness of STEM education through quality professional development and support
3. Strengthen industry, higher education, and Career Technical Education (CTE) partnerships that will increase graduation rates with students who are prepared and on track to pursue college and career pathways
4. Create, develop, and sustain an equity committee to ensure that the initiatives of the Frontier STEM Hub incorporate and adopt the principles of Oregon's Equity Lens, ensuring quality, culturally-responsive educational opportunities for all students of Malheur County

Key Initiatives

Chief Science Officers (CSOs)

This international student leadership program is supported by the National Science Foundation. In its second year in Malheur County, the program consists of 20 peer-elected youth from six area middle and high schools.

The goals of the CSO program are to:

- Increase student voice in STEM conversations
- Enrich student STEM culture and STEM career awareness
- Create a pipeline of diverse STEM leaders
- Enhance communication and collaboration between CSOs

CSOs at Leadership Training Institute in LaGrande.

FIRST LEGO League (FLL) Robotics

The number of robotics teams in Malheur County competing in FLL has increased from 2 teams in 2015/2016 to over 20 teams in 2018/2019. Through focused professional development, equipment lending programs, mini-grants for team and tournament registrations, and organized scrimmages for rookie teams to gain experience and confidence, the Frontier STEM Partnership worked to reduce barriers to entry for rural students, greatly increasing participation and STEM-learning opportunities.

Malheur Youth (MY) Health Science Day and Aviation STEM Field Days

Partnering with Oregon State University Extension, Treasure Valley Community College, Malheur ESD, the school districts of the county and numerous industry and community partners, Frontier STEM Hub has engaged the 7th and 8th graders of the Malheur County in interactive, hands-on, field days designed to increase students' knowledge, awareness, and aspirations toward STEM-related healthcare and aviation careers and pathways. For their efforts Frontier and their partners received two national awards: Excellence in Workforce Development Programming for MY Health Science Day and Excellence in Science, Technology, Engineering, and Math for MY Aviation STEM Field Day as awarded by the National Association of Extension 4-H Agents.

FRONTIER STEM HUB IMPACTS 2018-2019

Number of educators who participated in Hub PD or programs	Number of educator hours spent in Hub PD and programs	Projected number of students impacted by educator PD participation	Number of students who participated in Hub supported programs	Number of student hours in Hub supported programs	Number of teachers who participated in equipment loaning programs	Projected number of students who benefitted from equipment loaning programs
485	3,228	8,730	4,163	11,333	114	2,895

Nickie Shira, STEM & Innovation Coordinator | nickie.shira@malesd.org | 541-473-4865

5. GO-STEM

ABOUT

Vision

Greater Oregon (GO) STEM is a **regional partnership that values STEM learning, prepares youth for successful STEM careers, and builds pathways and pipelines to meet workforce needs.**

Area

GO STEM serves almost 30% of Oregon's geographical area. Its 7 eastern Oregon counties are Baker, Harney, Grant, Morrow, Umatilla, Union, and Wallowa. Despite its large area, the region's population is relatively low and very disperse—out of the region's 36 school districts, 30 (88%) are in areas classified as "rural" or "frontier."

Each county in eastern Oregon is unique and has its own distinctive needs. However, commonalities around the region include rural living, an abundance of public lands, and a history of natural resource based economies (primarily logging, agriculture and ranching). There are pockets of industry primarily focused on food processing and packaging that form significant numbers of jobs in some counties. GO STEM's mission is to employ these commonalities and align shared values, which will lead to a thriving workforce, career-ready rural youth, and regional prosperity.

STRATEGY

GO STEM's work is focused around the following three strategies for long-term success.

STEM Awareness, Pipelines & Pathways: Develop a STEM workforce that includes a variety of opportunity for different educational levels.

To accomplish this, GO STEM increases collaborations between employers and educational institutions. The collaborations serve to identify and develop specific skillsets needed to fill current and projected workforce gaps, and also help educate youth on regional STEM opportunities.

STEM Systems for Education: Ensure quality STEM educational offerings across Eastern Oregon. This will increase the number of regional high school graduates with full-time employment plans or post-secondary educational plans related to STEM fields.

To accomplish this, GO STEM works with educators and educational institutions to provide professional development, increase STEM exposure and accessibility to STEM resources.

Communicating Rural STEM Perspectives, Needs, Solutions and Opportunities: Communicate rural values and needs between employers, educators, students, and government.

To accomplish this, GO STEM facilitates ongoing discussions between entities to ensure that rural areas are seen as valuable contributors to statewide learning and growth. There is commonality in the geographic isolation of these small populations along with similar economic and educational issues. Coming together to address regional concerns allows the region to benefit from the sharing of perspectives, resources, and experiences.

Programming

STEM Coaching

GO STEM is collaborating on a STEM coaching model with La Grande School District. STEM coaching aims to improve classroom delivery of STEM-related topics, help teachers effectively integrate NGSS and develop STEM Leaders in all

schools. GO STEM's designated science coach is working with 28 K-8 teachers. Teachers participate in grade level sessions working together to integrate hands-on STEM.

Project Impact
GO STEM participated in a collective evaluation project to determine the effectiveness of the Increase Time on Science in Elementary Schools and the STEM Coaching projects. The focus was to determine, at the conclusion of one year of professional development, if:

1. Teachers comfort and confidence with STEM increased
2. Were teachers committed to real-world STEM teaching and learning
3. Did teachers begin to embrace inquiry and real-world learning at the heart of their practice
4. Were teachers using problem-solving, critical thinking, hands-on and inquiry-based teaching methods

The outcomes of the project will be compiled, along with the other Hubs participating, into a document that can be shared with interested parties.

Chief Science Officers
GO-STEM participates in the nationwide Chief Science Officer (CSO) Program. CSOs are high school students who choose to serve as local STEM leaders. Each CSO regional team completes an Action Plan to create STEM Awareness in their community.
In 2019:

- GO STEM has 24 CSOs and 8 advisors across 5 counties
    - Each CSO disperses information throughout their community and school
    - Male and female participation is roughly equal
- CSOs from GO STEM, Frontier and Columbia Gorge attended:
    - Leadership Institute (3-day event, hosted at EOU)
    - Spring Summit to showcase Action Plans
    - Regional trainings and networking events

Increase Time on Science in Elementary Schools
Professional development was offered to a cohort of teachers from summer 2018 – summer 2019. Twenty-Six teachers participated overall. Data collected at the conclusion of the PD showed teachers had increased confidence in teaching STEM, were able to integrate STEM into multiple subjects, were more comfortable implement NGSS and were using hands-on methods to teach science lessons.

Grant Awards

- **Career Connected Learning** - Oregon Community Foundation
    - Elementary, middle and high school programs are designed to empower and inspire students, create quality professional development for educators, link business and industry with education, support community and economic goals, and focus on equity and access for eastern Oregon students.
- **STEM Stays Here** - Oregon Community Foundation
    - Videos are created that highlight jobs and professions within the advanced manufacturing sector.
    - Address the "talent drain" in eastern Oregon and serve those farthest from the opportunities. This includes both students and teachers
    - Facilitate interaction and exploration of educational programming and business opportunities through events formed around videos.

Numbers

Within the 2018-2019 biennium:

- 1,500 total hours of teacher training provided to 150 educators
- 6,000 total hours of student participation provided to students in out of school programs/events
- 350 total hours of participation donated from 70 industry professionals

6. LANE STEM

LaneSTEM
2018 - 2019 Legislative Report

Connected LANE COUNTY

elevate lane county

STUDENTS

16 school districts

1,136 secondary students participating

64 industry partners

EDUCATORS

10 educators

1,750 hours spent in industry

Externship Testimonial

A fascinating experience. I am glad this was a three-week placement. Like all experiences in new fields, my head was spinning for the first few days with the large number of new terms and acronyms, and it took a couple of weeks for everything to coalesce. The management team was supportive and positive.

Angie Wean

Mathways

25 TEACHERS

8 DISTRICTS

The experience going to the Dorena Power plant was eye-opening to the students and me in terms of the amount of math necessary to the operation on a daily basis. The plant operator said that it took electrical engineering to really understand why algebra was so necessary in high school. This is a field that they are struggling to get qualified engineers to commit to the time required to become an electrical engineer, even though most training is paid training.

Creswell Math Teacher

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Computer Science & Digital Literacy

Increase in CTE programs from **1 to 12**

Launch of regional advisory board

Coder-in-Residence in **52 elementary classrooms**

12 new dual credit opportunities in high school

CTE Collaborations

3 New regional advisory boards launched together

Collaborated on hands-on learning day for middle school students

New Initiatives

Youth Equity Council

Youth Equity Council launched with six high schools

STEM Beyond School group formed

2018–2019
Leveraged Resources

Eugene | Oregon Community Foundation | Lane CTE | ies INSTITUTE OF EDUCATION SCIENCES | Oregon Forest Resources Institute

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7. MID-VALLEY STEM-CTE HUB

MID-VALLEY STEM-CTE HUB 2018-19

History
The Mid-Valley STEM-CTE Hub continues to be an emerging STEM Hub that seeks to serve the communities of Linn and Benton counties in the central Willamette Valley.

In 2004, the Mid-Valley Partnership (MVP, later expanded with the addition of Lincoln County to become the Mid-Valley Mid-Coast Partnership, or MVMCP) was created to engage Linn and Benton county educational institutions, share resources, and collaborate on strategies for improving the performance of the region's students and teachers. Since its inception, the MVP has collaboratively considered and implemented a variety programmatic responses to factors that become impediments to student success and, more recently, the possibility of creating a STEM Hub for Linn and Benton counties gained the group's focused attention. To this end, the MVP convened a small committee to work on concept and purpose, identifying partners and Linn-Benton Community College as fiscal agent, and finally submitted an application to the Oregon Department of Education. The Mid-Valley STEM-CTE Hub was subsequently approved late 2017. Fortunately, some of the work of this new STEM Hub was already underway through two programs vital to the Mid-Valley region.

One of these programs is the Degree Partnership Program (DPP) that began in 1998 when Oregon State University (OSU) and Linn-Benton Community (LBCC) created the capacity for students to co-enroll in these two institutions, dynamically combining the educational resources of both colleges in pursuit of a four-year bachelor's degree, primarily in STEM programs such as computer science and engineering. Since that time, this DPP program grown in size to serve approximately 2,000 OSU/LBCC students annually and has been expanded to include other offerings such as supplemental Mechatronics instruction (a field of science that combines mechanical systems using robotics and computers) at LBCC for OSU engineering students.

The second if these programs is Pipeline, a business-driven program that has exponentially expanded the capacity and enrollment in K-12 and LBCC programs that lead to family wage careers in the region's expanding manufacturing and health care fields. Since its inception in 2014, Pipeline has played a critical role in filling almost 1,000 new jobs in these two business areas.

Vision
The Mid-Valley STEM-CTE Hub is overt about its vision of uniting Career and Technical Education and STEM disciplines in a meaningful manner for students. The application of STEM education with CTE career training provides students with a greater understanding of concepts, increases problem-solving and critical thinking skills, sparks interest in course material, and prepares students work, college, or their next steps. Linn-Benton Community College's Career and Technical Education credential programs have a long history of working with area high

school Career and Technical Education programs and local employers. Those partnerships laid the groundwork by linking Career and Technical Education technical training with STEM education, as well as the development and focus of the Mid-Valley STEM-CTE Hub.

Activities

The Mid-Valley STEM-CTE Hub has gone through a couple of iterations since Oregon Department of Education approval in 2017.

Initially, our partners hired a full-time director and created a governance Board that was co-chaired by an industry-representative and a school district superintendent. This Board expanded and diversified its membership, worked to refine its strategic plans, and to clarify its value-added roles in the community. Initial thematic core initiatives were: 1) professional development for K-14 teachers, 2) employer and community linkages, 3) outreach, marketing, and advocacy for STEM and CTE career pathways, and 4) data collection, analysis, and improvement.

Unfortunately, the Mid-Valley STEM-CTE Hub experienced challenges in managing a Board that grew in size to almost 30, found raising resources to match and augment State support more difficult than anticipated, and then lost its Director after a year. With the continuation of State support in question, the Mid-Valley STEM-CTE Hub took a "wait-and-see" approach before working to regroup.

One the reasons that the Mid-Valley STEM-CTE Hub experienced so many challenges in its first year is that much – but certainly not all – of the purpose of the Hub was already being served by the Pipeline program, creating competition for both resources and opportunities in our region. With this in mind, a "new" STEM-CTE Hub/Pipeline Collaborative has been created by bringing these two entities under a single Board of Directors, combining program capacity and resources, and bringing our program partners together with a more unified vision for what we can do together. At this moment, this new Board is working to hire a new Director who will lead this integrated program.

The program for this new Mid-Valley STEM-CTE Hub/Pipeline Collaborative incorporates the already successful work of Pipeline, including direct communications with schools, students, and their parents, in-school and summer programs at LBCC, and business visits for both students and teachers, the OSU/LBCC Degree Partnership Program, and adding professional development opportunities for teachers to broaden the STEM-CTE opportunities for our students.

8. NORTHWEST STEM HUB

2018-19 Legislative Report

The Northwest STEM Hub is a vibrant partnership with bold aspirations. The NW STEM Hub has been created to:

1. Ensure formal and informal educational experiences are provided to members of the Region's communities, so they will be ready to engage in an economy and culture that is increasingly technological;
2. Invigorate educational opportunity and economic prosperity to benefit both individuals and local communities;
3. Ensure the historically predictable opportunity gap is closed for individuals of color, those who experience economic challenges, and those of rural origins.

These goals were developed over a three-year period, starting with the energetic work of Northwest STEM Partnership, the forerunner of the Northwest STEM Hub, and culminating over the last biennium since becoming a designated emerging STEM Hub in 2017, serving Columbia, Clatsop, and Tillamook counties. Throughout 2018-19, the NW STEM Hub continues to build relationships with cross-sector partners in order to expand regional P-20 STEM and CTE programming and develop career connected learning opportunities for youth and educators.

The work of the NW STEM Hub has facilitated and stimulated substantial STEM and CTE opportunities for regional P-20 education. Since its inception, NW STEM Hub efforts brought in more than $2,544,000 in STEM and CTE funding to the NWRESD's region to carry out its adopted mission, and countless more through in-kind contributions and sponsorship. The partners of the NW STEM Hub work collaboratively to develop and sustain dozens of opportunities for thousands of students. NW STEM Hub achievements include awareness and exposure activities, such as supporting the coordination of Clatsop County's Job and Career Fair and coordinating a National Manufacturing Day event with OMIC (Oregon Manufacturing and Innovation Center) in Columbia County. Other achievements include expanding STEM professional development for early learning service providers in partnership with the Northwest Early Learning Hub and CCR&R, along with partnering with the Oregon Science Project which offers learning facilitator and equity-based NGSS training to elementary educators. The biggest accomplishment to date

is the establishment of the regional Works programs in Clatsop, Columbia, and Tillamook counties, which offers paid internships and career connected learning opportunities in partnership with local industry. Throughout the 2018-19 school year, the Northwest STEM Hub has begun to develop a network of non-formal educators through supporting museum-based education and after school/out of school STEM programs within the regional public library systems. The NW STEM Hub has provided technical assistance the 13 school districts in the region to modernize and inject high wage/high demand STEM concepts into traditional CTE offerings. This comprehensive body of work is possible because Northwest STEM Hub has over seventy highly engaged, regional partners representing over sixty organizations who are deeply committed to the NW STEM Hub's work.

Data Points:

Our Hub is one of the Emerging STEM Hubs for the 2017-19 biennium and just began investing in STEM and CTE programs in 2018-19:

1. **Clatsop Works**
   The Clatsop WORKS Program was developed to provide local students of the five Clatsop County high schools and Clatsop Community College, ages 16 and up, with exposure to professional development, paid internship opportunities in Clatsop County, with the goals of community building, economic development, promoting local career opportunities and retaining local talent. Clatsop Works is in the process being scaled and replicated in Columbia and Tillamook counties.

   Total applicants 2018- 56 Total industry partner hosts 2018- 11 Total 2018 interns- 16
   Total applicants 2019- 132 Total industry partner hosts 2019- 12 Total 2019 interns- 22

2. **Non-formal Education Network**
   Through partnerships with the Columbia River Maritime Museum and the St. Helens Public Library, the NW STEM Hub has begun to establish a non-formal educator network. The Columbia River Maritime Museum provides museum-based and in school STEM programs throughout region and beyond. The St Helens Public Library expanded out-of-school STEM programming and a STEM-based "Library of Things" for youth and community members to check out. These programs laid the foundation for replication and scaling these out of school opportunities into other regions.
   CRMM youth served 2018-19- 15,000 St Helens youth served 2018-19- 5,689

3. **National Manufacturing Day**
   In 2019, OMIC R&D in Scappoose, Oregon, hosted a National Manufacturing Day event, which provided engaging hands-on activities for youth and community members to learn more about regional companies and education opportunities at a world-class R&D facility. This event was possible through the collaboration with the NWRESD, the regional workforce investment board, local post-secondary partners, and local manufacturing companies.

   Total youth served: 350 Total school districts engaged: 12
   Total industry partners: 46

9. OREGON COAST STEM HUB

WHO WE ARE

Oregon Coast STEM Hub (OCSH)

Headquartered at the Hatfield Marine Science Center in Newport, Oregon, the OCSH serves coastal educators, youth and rural communities located along the Oregon Coast, from Brookings up to Astoria. This distinctive landscape provides a unique opportunity for place-based learning focused on coastal ecosystems, ocean health, marine science and technologies, and career-connected learning for the maritime sector. The OCSH also supports a wide array of STEM teacher professional development and student STEM experiences outside of marine science, but our location along the ocean is a resource unique to the hub. The OCSH collaborates with more than 64 partners including 20 school districts, 6 post-secondary education institutions, 13 community organizations, 7 businesses, 6 government agencies, 5 centers, one regional achievement collaborative, and one Confederated Tribe.

VISION

Foster a culture of STEM innovation by engaging people of all ages to create a vibrant and prosperous region.

MISSION

Engage learners with STEM by leveraging local and regional resources and collaborating with diverse partners.

Student STEM Experiences

STEM Teacher Professional Development

Community Partnerships

OUR IMPACT

797 students engaged in OCSH facilitated or funded career-connected student STEM learning experiences.

451 educators engaged in career-connected STEM professional development impacting an estimated 15,785 students.

$274,399 in STEM investments secured for the coast.

Career Connected STEM Teacher Professional Development (PD) and Student Learning Experiences

This experience has changed the way I see science forever ~ Student

I learned more about what I want to do as an adult ~ Student

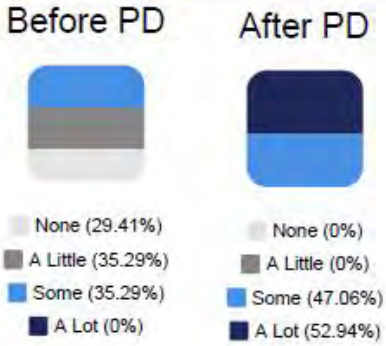
I am now using research-based science in my classroom on a daily basis ~ Teacher

The opportunity to work with marine researchers brings relevancy and engagement to the standards I teach ~ Teacher

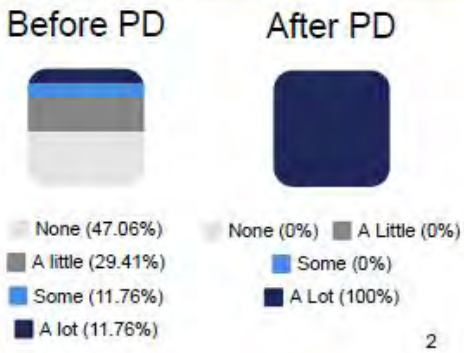
We now offer Engineering Fridays as part of our Creative Curriculum ~ Teacher

Being in the shoes of a scientist prepared me to use a theolodite, make a scientific presentation and sample by kayak ~ Student

My **Proficiency** in Facilitating STEM Experiences



My **Interest** in Providing STEM Learning Experiences



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10. PORTLAND METRO STEM PARTNERSHIP

Portland Metro STEM Partnership
650 NW 118th Avenue
Portland, OR 97229
info@pdxstem.org

OVERVIEW

Portland Metro STEM Partnership (PMSP) is a regional collaboration of public and private organizations with a shared goal of transforming science, technology, engineering, and mathematics (STEM) education for K-20 students. Launched in 2011 as a Collective Impact initiative, PMSP was the precursor for the Oregon STEM Hubs. We believe that high quality STEM education is critical for preparing our youth for a STEM-based economy and for developing a STEM literate society able to fully participate in our democracy. PMSP supports the creation of world-class STEM learning environments that are captivating and relevant for ALL students, regardless of background or zip code. PMSP's primary geographic area is defined by the boundaries of our five school district partners: Portland Public, Beaverton, Hillsboro, Forest Grove, and Banks. Our actual region extends beyond these boundaries as we engage community-based organizations, business/industry and other partners outside these school district boundaries.

CORE INITIATIVES

PMSP supports the creation of world-class STEM learning environments that are captivating and relevant for ALL students, regardless of background by:

- Providing access to effective professional development for all types of educators
- Facilitating STEM school transformation to become STEM- or STEAM-focused
- Developing in-school/out-of-school partnerships to expand STEM learning opportunities for youth.
- Cultivating career-connected learning so that students and educators understand how STEM courses and careers are intertwined
- Supporting educators' use of evidence to create strong learning environments for all youth

PMSP addresses these endeavors collectively, resulting in greater impact, by:

- Connecting and convening educators, businesses, professionals, and community programs to work together toward shared STEM education goals with larger effect
- Identifying resources and relationships across the region, leveraging the strengths and assets of partners to improve outcomes while reducing duplication of efforts and maximizing effectiveness
- Designing and implementing STEM programming for youth in multi-partner projects
- Providing tools, sharing proven methods, and offering consultations to strengthen our partners and bridge the gap between research and practice to improve STEM learning for all youth

SPOTLIGHT INITIATIVE: High School Science for All

Fifty-six districts across Oregon are piloting or implementing a common High School Science approach and curriculum designed to provide all students access to a rigorous, engaging, highly relevant, three-year learning pathway that better prepares them for post-secondary success. Development of

this curriculum began in 2011, when PMSP and Portland State University co-funded STEM Teachers on Special Assignment in our partner districts to support STEM education and identify barriers to success. Beaverton School District (BSD) reviewed course taking patterns and other data and discovered that students had hundreds of choices in how to earn their three years of science credit for graduation. Many students achieved their credit requirements through introductory science electives rather than a pathway that supported rigorous development of science literacy. As an example, only 11% of students were taking physics, a gateway into many STEM professions. Under this model, too many students, especially youth of color and youth qualifying for free or reduced lunch, were not accessing rigorous classes that would prepare them for college and career. Forest Grove School District saw similar patterns in their data. Seeking to change this dynamic, PMSP, BSD, FGSD, and PSU developed this 3-year science sequence aligned to the Next Generation Science Standards (NGSS): freshman physics, sophomore chemistry, and junior biology courses. In 2016, Portland Public Schools & Hillsboro School District joined this collaborative effort that includes summer professional development for high school science teachers implementing the curriculum. These four districts serve approximately 20% of the students in Oregon. Open source and continually refined curriculum and annual summer educator institutes have supported the expansion across the state to reach nearly one in three Oregon high school students.

IMPACTS THIS BIENNIUM

Impact Area	Value
Number of educators who participated in Hub PD or programs	1.145 educators
Number of educator hours spent in Hub PD and programs	13,882 educator hours
Project number of students impacted by educator PD participation	94,678 students impacted
Number of industry volunteers who participated in Hub activities	291 industry volunteers
Number of industry volunteer hours	594 volunteer hours
Number of students who participated in Hub support programs	3,134 students
Number of student hours in Hub support programs	20,616 student hours
Estimate of students who benefit from equipment loaning programs	3,250 students
Estimate of teachers who benefit from equipment loaning programs	27 teachers

PMSP Leveraged Funds (non-state funds):	Value
Grants and sponsorships (2017-2019)	$435,706
Partner investments in Hub initiatives (2017-2019)	$1,175,600
In-kind time and resources (2017-2019)	$397,490
Funding secured during this biennium for the future (2019-2023)	$992,521
Total	**$3,001,317**

11. SOUTHERN OREGON STEAM HUB

Southern Oregon STEAM Hub 2018-19

Background

The Southern Oregon STEAM Hub uses the collective impact approach serving formal and informal educational organizations in Josephine, Jackson and Klamath counties, including 13 school districts with 8 percent of Oregon's school-aged population.
Our mission infuses STEAM (Science, Technology, Engineering, Arts, and Mathematics) into every classroom and beyond. STEAM references both courses/academic disciplines and a "way of thinking/being" in the classroom. Scientific inquiry, creativity, innovation, computational thinking, project-based learning, and collaborative problem solving are the hallmarks of the 21st century workplace and SOESD schools. These skills along with core relationship competencies and mindsets drive the outcomes necessary to thrive bringing economic prosperity to all!

Core strategies and Initiatives

Overarching all the strategies and initiatives below, and core strategy in and of itself, is to increase the diversity of participants in STEAM activities. Specifically, our focus is to increase the number of underserved/non-traditional educators and students who have access to and persist in STEAM opportunities.

1. Educator Professional Development

Key among our STEAM Hub strategies is to increase educator access to high-quality STEAM related professional development. This includes PD that increases efficacy with applied, project-based learning strategies as well as increases educator understanding of, and experience with how STEAM content manifests in STEAM fields. During the 2018-19 fiscal year we have supported world-class training delivered to our educators such as Best Practices in Math by Teacher's Development Group that provided training for 24 teachers from 8 school districts. We collaborated with the Umpqua STEAM Hub to maximize collective impact. Our follow-up support from Teacher's Development Group is also shared with the Umpqua STEAM Hub.

2. Youth Voice Initiative

During Spring 2019, 8 of our high schools voted in 20 Chief Science Officers. These CSOs attended a summer leadership seminar to learn about what it means to be a CSO, create their STEAM awareness strategic plans and meet with local industry. These

CSOs are ambassadors helping adult decision makers in education and industry to better understand the needs of diverse students in the region. The Youth Voice initiative leverages student voices to promote STEAM activities, events, and opportunities to their peers.

3. Partnerships

Partnerships and collaboration are a vital component of sustainable programming and efforts to maximize impact and outcomes. Southern Oregon Steam Hub partnered with Boys and Girls Club, Camp Invention, Southern Oregon Air Academy, Talent Maker City, and Mazama Jr. STEM & M to conduct 34 weeks of after school and summer camps serving 797 students. Maintaining our partnerships is a priority and the SOESD currently lists over 40 active industry, business, community, and government agencies with whom we robustly collaborate on STEAM events, activities, and opportunities for educators, students, and their families.

4. Data-driven Decision Making

Southern Oregon STEAM Hub contracted with Education Northwest and Willamette Education Service District to help with major data gathering and analysis. Our goal is to help our governance committee grasp more clearly who among our students is accessing accelerated learning opportunities and in which areas, whether we are hitting our equity targets, how students are responding to summer and afterschool camp offerings, etc. Researchers are supporting us by developing a universal evaluation plan to identify common and unique data elements across each of our various grant projects, develop appropriate evaluation instruments for project outcomes lacking available data elements, and collaborate with project staff to develop reports and Info-briefs for marketing/communication with stakeholders.

Anyone interested in our 2018-19 outcome data and other recently compiled reports may email karla_clark@soesd.k12.or.us

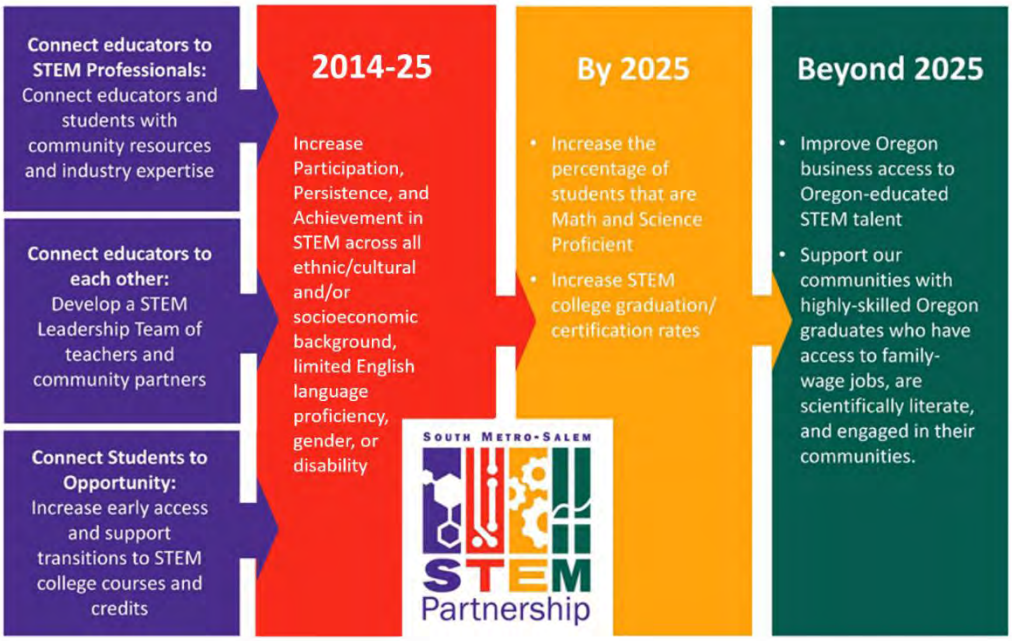
Major events/projects to highlight

1. Southern Oregon STEAM Hub Lending Library

The lending library is Southern Oregon's home for experiential, hands-on, project-based, STEAM (Science, Technology, Engineering, Arts, and Math) learning equipment, tools, and activities. Educators in our component districts and education partners access the library free of charge. Teachers creating relevant, stimulating STEAM experiences for their students, and teachers with a passion for robotics, 3D printing, laser engraving, coding, science, engineering and aviation, will find an ever-expanding treasure trove of lessons, learning tools, and equipment. We will soon have 3 mobile maker spaces available for check out; These maker spaces will be deployed to each of our 3 counties starting in our most rural middle and elementary schools. Professional development is scheduled routinely for our educators to become familiar with and comfortable in their classroom using these lending library items.

12. SOUTH METRO-SALEM STEM PARTNERSHIP

The South Metro-Salem STEM STEM Partnership (SMSP) is a collaborative of community leaders, representing 17 K-12 school districts, 5 higher education institutions, and more than two dozen industry, civic, non-profit, and community organizations, with the vision to catalyze Oregon students to achieve STEM degrees and certificates, and reach Oregon's education goals by increasing the access, excitement and engagement of students in STEM courses and experiential learning. Since 2012, we have leveraged more than $3.3M of external funding ($130K in new dollars, FY2019), in addition to state funds, for projects to advance our STEM goals among and in support of our partnering organizations. We seek to achieve these goals by focusing our efforts on activities and objectives that support three core strategy areas that represent the assets, needs, and opportunities in our region, with particular emphasis on strategies that have potential for scalability and/or transferability within the STEM Oregon regional hub network.



The SMSP region is comprised of the suburban and rural areas south and southeast of Portland, continuing through rural regions surrounding the I-5 corridor extending into the urban community of Salem. The 16 partnering school districts serve over 125,000 students, or about 25% of the state's K-12 students. While our partners acknowledge that our region is rich in STEM resources, there has not historically been cross-district or cross-sector collaboration to tap these resources in a coordinated, systemic, equitable manner. Localized economic and geographic disparities have largely determined which students could access high quality STEM educational resources. Local employers are unable to fill open, well-paying STEM jobs with students from their community, all of which are increasingly ethnically and racially diverse. *Systemic coordination of efforts, collection of data, encouragement of new partnerships, and initiation of new opportunities to acquire resources are needed. The hub backbone enables such cross-sector collaboration across our three core strategies to ensure that best practices*

and valuable resources are shared among educators, across sectors, and between partner institutions for the good of all students in our region, our workforce, and our communities.
Since 2012, the SMSP partners have engaged in a number of activities and initiatives related to the main core strategies that have resulted in demonstrable change to the regional STEM education landscape (Key initiatives bolded).

1. Connect educators and students with community resources and industry

   Key Achievements in FY19:

   - **Statewide support for Oregon Connections, powered by Nepris, an online platform facilitating real-time virtual skills-based connections between educators and STEM industry volunteers.** 900 Oregon industry professionals and 2,100 educators statewide join a national network of 50,000 professionals. The SMS region had 4,890 students participate in more than 700 experiences with professionals in 2018-19.
   - Supported expansion of Oregon Connections into Umpqua and Frontier STEAM Hubs.
   - Established model for locally relevant regional STEM Educator Tours of local industry sites for teaches and district administrators, coupled with curriculum-aligned career-relevant classroom activities.
   - Established (and continue to maintain) STEMOregon.org as a central shared asset for STEM education in Oregon.

2. Connect educators to each other.

   Key Achievements in FY19:

   - **Continued support for local efforts of SMSP STEM Leadership Team (150 regional teacher-leaders)**
   - Renewed $130K funding to support development and delivery of standards-based NASA-related STEM professional development to >120 middle school teachers
   - Served as Oregon's nucleus for the Northwest Earth Space Science Pipeline collaborative with University of Washington; hosted Apollo Next Giant Leap Student Challenge for >100 middle and high school students (drone and robotics challenge) to commemorate 50th Anniversary of the moon landing. Collaborated with ODE Indian Education to host Dr. Jon Harrington, first Native American astronaut in space, as keynote. Planning 2020 ROADs on Mars Challenge.
   - Piloted model for Oregon Community Foundation Oracle Funds disbursement by Facilitating community matching grant in Dallas, OR. Developed Dallas Spark initiative, raising $16K ($8K locally, $8K matching from Oregon Community Foundation) and community awareness for project-based, student-centered education.
   - Collaborated with Willamette ESD to engage >145 teachers in summer externships.
   - Supported opportunities for SMS regional middle school teachers to engage in Math in Real Life project, in collaboration with teachers across Portland and East Metro STE(A)M Partnership regions.
   - Facilitated development of Computer Science and Digital Literacy K-12 Implementation Plans in pilot districts focused on expanding access to quality computer science to underserved students.

3. Connect students to post-secondary opportunity.

   Key Achievements:

   - **Increased enrollment in STEM Accelerated Credit (AP, IB, Dual Credit) by 2% from 2014-15 to 2015-16 (most recent data available).**
   - Increased enrollment in high school STEM/CTE electives by 13% overall (22% Hispanic/Latino, 17% English Language Learners, 16% F/R lunch).

13. UMPQUA VALLEY STEM HUB

REPORT TO THE LEGISLATURE

2017-2019

INTRODUCTION

The mission of the Umpqua Valley STEAM Hub is to support and provide inspiring, engaging, authentic STEAM learning experiences for youth in Douglas County preparing them for future careers and a meaningful future.

The Umpqua Valley STEAM Hub serves the geographic area of Douglas County which includes 13 school districts meeting the educational needs of 14,000 students. 7 of the 13 districts serve less than four hundred students and 10 of 13 have 60% or more qualifying for Free/Reduced lunch. Our communities are considered rural with considerable distance between schools spread throughout the 5134 square miles of Douglas County.

STRATEGIC GOALS

1. Improve the quality of STEAM learning experiences PreK – 16+ both in and out of school by supporting educators through professional development and a resource lending library.
2. Expand opportunities for family and community engagement in STEAM Learning experiences to build community ownership for quality STEAM education.
3. Increase the number of students engaged in STEAM career connected learning experiences through awareness, exploration and preparation with support for future planning including post-secondary education

PROFESSIONAL DEVELOPMENT SUPPORT

Over 200 unduplicated educators representing all districts, private schools, home-school leaders, early childhood educators and non-profit youth serving organizations have been reached. Our signature event is the week long STEAM Institute held in August at Umpqua Community College offering multiple sessions with follow-up through the year. Emphasis is on project-based learning, argument-driven inquiry, and designing quality STEAM lessons with a priority for PreK and elementary

December 2019

RESOURCE LENDING LIBRARY

Over 175 local educators are registered users of the Resource Lending library which provides a vast collection of tools to support quality STEAM learning. www.umpquasteamhub.org At least 5750 students are estimated to have been impacted by the lending library resources.

COMMUNITY ENGAGEMENT

STEAM EXTRAVAGANZA
The annual STEAM Extravaganza presents a variety of STEAM activities from building a pipe organ, designing and creating various structures, experimenting with drones, robotics and GIS technology and exploring various CTE and STEAM courses of study at Umpqua Community College. In 2019, over 600 people of all ages participated in activities delivered by 45 community partners.

COMMUNICATION and STORY SHARING
Through the support of communication specialists, the stories of STEAM education in the Umpqua Valley are shared regularly through websites (www.dcpss.org www.brightfuturesumpqua.com), social media, The Partner's Post, television, radio and local newspapers.

STEAM CHAMPIONS CELEBRATION
The Umpqua Valley STEAM hub places a high value on building shared ownership for STEAM education with business/industry, educators, community leaders, non-profits, parents and students. In October, 95 champions from across our county were celebrated at a Partner's celebration.

BRIGHT FUTURES UMPQUA

The Bright Futures Umpqua initiative emphasizes the connection between quality STEAM education and future careers leading to personal and community vitality.

EXPANDING HORIZONS
SUMMER CAMP
Week long summer camps in a variety of STEAM career areas have impacted over 300 middle and high school students. Camps occur in locations across the county to facilitate engagement of typically underserved populations.

OREGON CONNECTIONS
Oregon Connections provides career connected learning through virtual field trips, "chats" with industry professionals both local and national, and access to digitized presentations where professionals share their skills and expertise to bring authentic learning opportunities to students. 70 educators have been trained, 700 students reached, 4 virtual field trips completed and 30 local sessions completed.

BRIGHTWORKS AMBASSADORS

Using the Chief Science Officer model develop through Arizona SciTech, we are supporting 3 projects in the Umpqua Valley to elevate the youth voice in STEAM education. Our Brightworks Ambassadors at Roseburg High School are leading elementary robotics clubs at 2 elementary schools reaching about 150 students. At the Boys & Girls Club, Friday night STEAM nights for teens are being led by Brightworks Ambassadors once a month. At Phoenix School, Brightworks Clubs are established in healthcare, Manufacturing/Design, The Trades and Culinary Arts.

HIGHER EDUCATION COORDINATING COMMISSION

HIGHER EDUCATION COORDINATING COMMISSION
255 Capitol Street NE, Salem, OR 97310
www.oregon.gov/HigherEd

HIGHER EDUCATION COORDINATING COMMISSION
December 12, 2019
Docket Item #: 11.3

Docket Item:

Postsecondary Student Transfer Report (HB 2998, 2017)

Summary:

In 2017, the Oregon Legislature passed HB 2998, which directs the Higher Education Coordinating Commission (HECC) and community colleges and universities listed in ORS 352.002 to streamline transfer pathways between Oregon's public community colleges and universities.

Included in the legislation is a requirement that the HECC submit an annual report to the Legislative Assembly, that:

- For each unified statewide transfer agreement established under ORS 350.404, contains a report on the number of academic credits that were successfully transferred in that major course of study by students who transfer from a community college to a public university;

- To the extent relevant data is available, the commission shall report annually to the Legislative Assembly on whether existing unified statewide transfer agreements are meeting the goals set forth in ORS 350.404 (2) which include minimizing student debt, increasing transfer rates, decreasing excess credits, and maintaining standards of intellectual and academic rigor.

Because implementation of HB 2998 mandates are in an early phase, data are not yet available to examine the success of transfer tools. Instead, this report provides:

- A brief history on HB 2998 for context;
- An update on implementation of House Bill 2998;
- Identifies some of the challenges and;
- Makes recommendations.

Materials:

Postsecondary Student Transfer Report (HB 2998, 2017) attached.

Staff Recommendation:

Staff recommends the Commission move to approve the Postsecondary Student Transfer Report (HB 2998, 2017) for submission to the Legislative Assembly.

HIGHER EDUCATION COORDINATING COMMISSION

HOUSE BILL 2998 (2017): IMPLEMENTATION PROGRESS

December 2019

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ACRONYMS: ORGANIZATIONS AND STATEWIDE AGREEMENTS

AAOT	Associate of Arts Oregon Transfer: a 90 credit statewide transfer degree
ASOT-B	Associate of Science Oregon Transfer – Business: a 90 credit statewide transfer degree for potential Business majors
ASOT - CS	Associate of Science Oregon Transfer – Computer Science: a 90 credit statewide transfer degree for potential Computer Science majors
CIA	Council of Instructional Administrators (Community College)
CSSA	Council of Student Service Administrators (Community College)
FC	Foundational Curricula: groups of eight general education courses, equivalent to at least 30 credits that transfer to any public university in Oregon and apply to the university's degree requirements. This has been rebranded and is now referred to as a Core Transfer Map
IFS	Inter-institutional Faculty Senate: a group of faculty senators from the seven public universities and Oregon Health Sciences University
JTAC	Joint Transfer Articulation Committee: a group of administrators, faculty, and advisors that advises HECC on cross-sector transfer and articulation
OAAA	Oregon Academic Advising Association
OCCA	Oregon Community Colleges Association: a community colleges advocacy and policy non-profit organization
OCOP	Oregon Council of Presidents: a voluntary association of public university presidents
OEA	Oregon Education Association: a union representing community college faculty
OPC	Oregon Presidents' Council: a voluntary association of community college presidents
OSA	Oregon Student Association: a student-led advocacy non-profit organization
OTM	Oregon Transfer Module: a 45 credit suggested first year curriculum for community college students who plan to transfer to a public university
USTA	Unified Statewide Transfer Agreement: a 90 credit, major specific statewide transfer tool which has been rebranded and is now referred to as a Major Transfer Map

EXECUTIVE SUMMARY

House Bill 2998 (2017), directs the Higher Education Coordinating Commission (HECC) and community colleges and universities listed in ORS 352.002 to streamline transfer pathways between Oregon's public community colleges and universities. Included in the legislation is a requirement that the HECC submits an annual report to the Legislative Assembly, that:

• For each unified statewide transfer agreement established under ORS 350.404, contains a report on the number of academic credits that were successfully transferred in that major course of study by students who transfer from a community college to a public university;

• To the extent relevant data is available, the commission shall report annually to the Legislative Assembly on whether existing unified statewide transfer agreements are meeting the goals set forth in ORS 350.404 (2) which include minimizing student debt, increasing transfer rates, decreasing excess credits, and maintaining standards of intellectual and academic rigor.

Because implementation of HB 2998 mandates are in an early phase, data are not yet available to examine the success of transfer tools. Instead, this report provides:

• A brief history on HB 2998 for context;

• An update on implementation of House Bill 2998;

• Identifies some of the challenges and;

• Makes recommendations.

INTRODUCTION

BACKGROUND

Oregon transfer students have lower rates of successful transfer compared to their national peers, and relative to first-time freshman in Oregon they are less likely to graduate from college[1] and more likely to graduate with excess credits.[2,3] For example, only 26% of Oregon community college students transfer to a 4-year institution within six years, compared to 37% nationally. Additionally, transfer is not equitable: according to national data 45% of White students transferred within six years of enrollment, compared to just 31% of African American and Hispanic/Latinx students (similar comparisons were not available for Oregon at the time of this report).[4]

The most common transfer pathway in Oregon is from a two-year public college to a four-year public college (26% of resident undergraduates at Oregon public universities transferred from a community college)[5]. This pattern reflects national trends. A recent study on credit loss estimated that when students transfer from a public two-year college to a public four-year college, they lose an average of 22 semester credits or 33 quarter credits in the process. Because Oregon universities use the quarter system, this means on average transfer

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[1] A look at the six-year graduation rates in Oregon of first-time freshman compared to transfer students with comparable credits, reveals that transfer students have a graduation rate of 52% compared to a 76% graduation rate for first-time freshman (Higher Education Coordinating Commission Office of Research & Data, University Student Records data, Fall 2010 cohort)

[2] Higher Education Coordinating Commission Office of Research & Data, University Student Records data, Fall 2010 cohort.

[3] Excess credit is defined as, "A credit that does not fulfill any relevant academic requirements for a given student, including: a) Strict graduation requirements, such as for primary major, bachelor's, and general education; b) Elective credits needed beyond those strict graduation requirements to meet overarching credit requirements (total credits, upper division credits); and c) Requirements for a desired auxiliary academic program, such as an additional major, minor, or pre-professional program, even if this would require credits in excess of overarching credit requirements" (Cox, Amy. 2018. Oregon Community College to University Transfer. Slide 11. Presentation to the USTA Launch Meeting. https://www.oregon.gov/highered/policy-collaboration/Documents/Transfer-Credit/2998/USTA_Launch_Full_SlideDeck_04.06.2018.pdf)

[4] Crisp, Gloria. 2019. College to University Transfer Systems. Slides 2-3. Presentation to the Senate Interim Committee on Education.
https://olis.leg.state.or.us/liz/2019I1/Downloads/CommitteeMeetingDocument/206707

[5] Cox, Amy. 2018. Oregon Community College to University Transfer. Slide 11. Presentation to the USTA Launch Meeting. https://www.oregon.gov/highered/policy-collaboration/Documents/Transfer-Credit/2998/USTA_Launch_Full_SlideDeck_04.06.2018.pdf

students could be spending as much as $26,000 more than typical first-time freshman at University of Oregon, $24,000 more than typical first-time freshman at Oregon State University, and $20,000 more than typical first-time freshman at Portland State University to complete the same degree.[6] Taken together, transfer students are spending more time and money with lower rates of success, and this disproportionately impacts students who may be least able to afford college.

While a number of factors contribute to differences in transfer rates, graduation rates, and credit loss, such as lack of access to quality advising, and student uncertainty over choice of major, one clear area where state policy can make a difference in the lives of students is through streamlining complex institutional pathways and clarifying requirements to ease transfer for students.[7] In Oregon, students have had access to statewide transfer tools such as the 90-credit Associate of Arts Oregon Transfer (AAOT), the 90-credit Associate of Science Oregon Transfer (ASOT), and the 45-credit Oregon Transfer Module (OTM). Additionally, the Legislature passed a "Transfer Student Bill of Rights" in 2011, which established methods to resolve credit transfer issues. Still, these tools may inadvertently encourage students to accumulate of excess credits, and some students still find their credits are only accepted on a course-by-course basis.[8]

House Bill 2998 (HB 2998) was passed in 2017 and directs the Higher Education Coordinating Commission (HECC) and Oregon's community colleges and public universities listed in in ORS 352.002 to improve transfer pathways between two-year public colleges to four-year public universities. Specifically, HB 2998 includes the following mandates:

- The HECC shall convene community colleges and universities to develop common foundational curriculum/a available to students by 2018-2019 academic year;
- Community colleges and universities shall develop unified statewide transfer agreements (USTAs) for each major course of study (3 USTAs per year);
- The HECC shall inform and engage students and schools on status and developments;
- The HECC shall report annually to Legislative Assembly, when data is available, on progress toward goals of unified statewide transfer agreements and;

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[6] Taylor, Jason. 2019. Credit Loss and State Transfer Pathways. Slides 2-4. Presentation to the Senate Interim Committee on Education.
https://olis.leg.state.or.us/liz/2019I1/Downloads/CommitteeMeetingDocument/206741

[7] Taylor, Jason. 2019. Credit Loss and State Transfer Pathways. Slides 2-4. Presentation to the Senate Interim Committee on Education.
https://olis.leg.state.or.us/liz/2019I1/Downloads/CommitteeMeetingDocument/206741

[8] The ASOT and the AAOT were designed to meet all lower division general education requirements at all seven Oregon public universities. However, to satisfy the disparate general education requirements across all institutions, each degree contains more-lower division general education than is necessary at any one institution—resulting in excess credits for transfer students.

- The HECC shall convene community colleges and universities to ensure continued alignment of established unified statewide transfer agreements.

HB 2998 (2017) addresses some of the unintended shortcomings of prior statewide transfer tools, such as excess credits, through its mandates. The HB 2998 foundational curriculum (FC) requirement of 30 credits of general education specifies that the FC must count toward degree requirements (rather than electives) and is intended to ease general education credit transfer. The requirement that colleges and universities develop three USTAs per year is a requirement intended to provide students with a tool that guides them within a particular major, and is a significant departure from the general education focused transfer tools of the past. USTAs must be designed so that students can transfer with no lost credit or unnecessary repeated coursework. USTAs also must be designed so that students who successfully complete them will have junior standing in the major course of study.

This report is the first annual report on HB 2998 (2017) progress toward the goals of the unified statewide transfer agreements. The requirements outlined in state statute ask for an annual report on:

- The number of academic credits, for each USTA, that were successfully transferred in that major course of study from a community college to a public university;
- A comparison of the number of credits upon completion of a bachelor's degree between first-time freshman, and transfer students who successfully completed a USTA and transferred to a public university;
- Transfer rates of community college students;
- Whether USTAs are helping to minimize student debt and;
- The extent to which USTAs are maintaining standards of intellectual and academic rigor at community colleges and public universities,

However, HB 2998 (2017) implementation work is in an early phase and the required data are not currently available. Instead, this report will provide an update on implementation progress on foundational curriculum and unified statewide transfer agreements.

THE OREGON TRANSFER & ARTICULATION COMMITTEE

Background: Transfer Workgroup

To satisfy HB 2998's mandates, the HECC convened a Transfer Workgroup comprising faculty and staff from Oregon's community colleges, public universities, and related stakeholder groups. The HECC consulted with academic leadership in both the community college and public university sectors throughout the state, such as the Provosts Council and the Council of Instructional Administrators (CIA).[9] The final composition of the

[9] The group also consulted with the Council of Student Services Administrators (CSSA), Joint Transfer and Articulation Committee (JTAC), Oregon Academic Advising Association (OAAA), Oregon Community College Association (OCCA), Oregon Council of Presidents (OCOP), Oregon Education Association (OEA) and Oregon Student Association (OSA) to request nominations for membership on the Workgroup.

Transfer Workgroup included representation from each of the seven public universities and seven of the community colleges – some of whom also represented stakeholder groups – the Commission, the Chief Education Office, Oregon Community College Association (OCCA), Oregon Council of Presidents (OCOP), and Oregon Student Association (OSA). The Workgroup also included as an observing member a representative from the state's private non-profit colleges.

The Transfer Workgroup was tasked with: 1) establishing one or more foundational curricula; 2) recommending the first three major courses of study for unified statewide transfer agreements, and the criteria on which that and future determinations are based; 3) providing counsel to the HECC on the creation of a definition of "lost academic credit" for the HECC's report to be submitted to the Legislative Assembly by February 1, 2018; and 4) providing counsel to the HECC on whether the recommended foundational curricula established should be transferable for students who transfer from one community college to a different community college or from one public university to a different public university.

The Transfer Workgroup successfully completed the required tasks. First, the Transfer Workgroup determined a best measureable alternative to "lost academic credit". After extensive deliberation over operationalization considerations, such as data constraints, the group decided that the best way to measure "lost academic credit" was through a measure of "excess credit" which they defined as "the difference in the average total number of credits at degree completion between transfer students and first-time freshmen." Second, the workgroup also fulfilled their charge to create and make policy recommendations for foundational curriculum. Specifically, the workgroup recommended prioritizing community college to public university transferability over community college to community college transferability considerations. The workgroup also finalized the foundational curricula (FC) in the spring of 2018, which allowed the FC to be available across all Oregon community college campuses by January of 2019.

The final charge of the workgroup was to establish criteria and a ranking system for selecting USTAs. Legislation specified that the workgroup must include major disciplines with the highest workforce demand and major disciplines with the highest enrollment among students who transfer from a community college to a public university. The workgroup, however, also decided that other factors were important to consider and included the following criteria in determining USTA selection: excess credit upon completion for transfer students compared to first-time freshmen; the feasibility of establishing a USTA (based on factors such as known curricular challenges, the existence of a group or groups already conducting similar work, etc.); the equity of the major course of study (based on factors such as enrollment at the point of transfer and at completion of underserved students, and the disparity between those numbers; and disciplinary variety to ensure a balance of STEM, social science, humanities, etc. major courses of study among the USTAs to be established (this process is detailed in the January 2018 report to the legislature[10]). Using a weighted two-stage ranking system and the agreed upon criteria to determine the first USTAs, the workgroup selected biology, business, elementary education, and English literature.

From JBAC to OTAC

[10] Higher Education Coordinating Commission. 2018. House Bill 2998 (2017): Post Secondary Student Transfer. Report to the Legislature. https://www.oregon.gov/highered/research/Documents/Reports/HB-2998-2017-Report.pdf

In 1992, the Joint Boards Articulation Committee (JBAC) was established to promote cooperation and collaboration among all education sectors in Oregon: K-12, community colleges, and baccalaureate-granting institutions. In 2015, following the reorganization of Oregon's governmental education bodies and establishment of the HECC and its supporting agency, JBAC was disbanded and replaced with the Joint Transfer and Articulation Committee (JTAC). Whereas JBAC acted as a direct advisory body to HECC commissioners and engaged in some commission-level work, JTAC advised HECC agency staff directly on policy regarding student transfer among Oregon community colleges and public universities.

During the course of the HB 2998 Transfer Workgroup's work, it became clear that a formal group needed to be established to continue the coordination, advising, and maintenance of Oregon's transfer policies, tools, and communications. While JTAC performed many of these duties, though not in regard to the products of HB 2998, there was concern that JTAC lacked the representation, particularly of institutional faculty, to fulfill this role. JTAC and the Transfer Workgroup agreed to merge and form a new body in 2018: the Oregon Transfer and Articulation Committee (OTAC).

The merger of the two groups created a well-balanced transfer workgroup designed to facilitate collaboration across functional roles in Oregon's postsecondary sector. While OTAC strives for membership from a diversity of colleges and universities, members represent their functional role, not their institution. Post-merger, when roles or institutions were not represented, the HECC followed the same process for recruitment used for the HB 2998 Transfer Workgroup, where academic leadership, such as the Provosts Council and the Council of Instructional Administrators (CIA), were consulted in order to obtain a diverse, cross-sector representation of roles in higher education—including advisors, faculty, registrars, and institutional research staff.

OTAC's main charge is to ensure effective coordination and collaboration among sector leaders and provides information and recommendations to HECC staff, universities, and community colleges on issues related to postsecondary student transfer.

OTAC Progress

OTAC has met a total of ten times from August of 2018 through November of 2019 and has successfully accomplished the following tasks:

- Approved an Implementation Guide to help stakeholders both understand and implement HB 2998 FC and USTAs;
- Approved the Biology USTA on November 27, 2018 before the state-mandated deadline of December 1, 2018;
- Approved the English Literature (BA) USTA on March 15, 2019 before the state-mandated deadline of April 1, 2019;
- Approved the Elementary Education (BS) USTA on October 18, 2019 before the state-mandated deadline of December 1, 2019;
- Reviewed and provided recommendations on memorandums of understanding drafted for USTA's;

- Reviewed and provided recommendations on USTA variance guidance document—a document that establishes agreed upon standards of curricular variance in USTAs;
- Recommended new USTAs: Computer Science, Criminal Justice, and Business and;
- Recommended the creation of transfer associate degrees for newly developed major pathways.

While OTAC in collaboration with HECC staff has accomplished much in the past year, the group has also laid out an ambitious agenda for the winter and spring of 2019-2020. For example, three small groups have formed: one is comprised of OTAC members, students, and HECC staff who will meet to help determine the technological needs necessary to support the new transfer tools of HB 2998. The second small group comprised of OTAC members and HECC staff is tasked with identifying challenges and making recommendations over general education transferability. The third small group will work with HECC staff and communications consultants to generate student-friendly HB 2998 communications tools, such as transfer templates, videos explaining the new transfer tools, infographics for social media use, and a one-page document that helps explain USTAs. Lastly, a launch meeting will take place to introduce new USTA groups to their charge, and work on the new USTAs will begin.

REBRANDING

In 2018, the HECC contracted with a marketing firm to rebrand the Foundational Curricula and Unified Statewide Transfer Agreements in an effort to make these tools more intuitive and accessible to students, advisors, and other prospective users. After consultation with members of the Transfer Workgroup and several community college students, the HECC agreed to the following: 1.) Foundational Curricula became Core Transfer Maps; 2.) Unified Statewide Transfer Agreements became Major Transfer Maps and: 3.) The suite of statewide transfer tools in Oregon, including Core Transfer Maps, Major Transfer Maps, AAOT, ASOT, and OTM, should now be called the Oregon Transfer Compass. The rebranding effort also lead to the development of a logo made in the colors of the state flag as seen in Figure 1. Hereafter, Foundational Curricula and Unified Statewide Transfer Agreements will be referred to as Core Transfer Maps (CTMs) and Major Transfer Maps (MTMs).

CORE TRANSFER MAPS

HB 2998 tasked the HECC with convening community colleges and public universities to create one or more Foundational Curricula, now called Core Transfer Maps, which are groups of eight courses, equivalent to at least 30 credits, that allow community college students who complete them to transfer all credits from the Map to any public university in Oregon and apply all of those credits to the university's degree requirements. Core Transfer Maps consist of six general education subjects: Writing, Cultural Literacy, Arts & Letters, Natural Sciences, and Mathematics. Like, the OTM and the AAOT, Core Transfer Maps are designed for students who are neither sure what major they want to pursue nor the Oregon Public University to which they want to transfer.

The Core Transfer Maps, similar to past transfer tools such as the AAOT, the ASOT, and the OTM, are grounded in the Outcomes and Criteria for Transferable General Education Courses, or "AAOT course outcomes." The Joint Boards Articulation Committee (JBAC), a precursor to JTAC, developed nine AAOT course outcome for common subject areas in lower division general education: Arts and Letters,

Cultural Literacy, Mathematics, Science or Computer Science, Social Science, and Speech/Oral Communication. For each subject area, JBAC specified a set of learning outcomes in addition to criteria that demonstrates sufficient achievement of the learning outcomes (See Appendix B). These outcomes originally formed the basis of the AAOT, the ASOT, and the OTM, and they now also extend to the Core Transfer Maps. In practical terms this means that community college students can select from a list of courses at their institution that meet the criteria for the relevant general education outcomes, and those courses will transfer and apply to general education requirements at any of the seven Oregon Public Universities. At this time, the courses on the general education outcomes list will only be guaranteed to apply toward general education requirements at public universities if they are part of a block of courses in a preexisting transfer tool (e.g. AAOT, ASOT, OTM, Core Transfer Maps, and Major Transfer Maps).

Core Transfer Maps, which have been available to students since January of 2019, are a subset of General Education courses contained in both the OTM and the AAOT, but they are also unique in several ways. First, the OTM and the AAOT were not designed to be a perfect fit for any destination university, and as a result they led students to take more general education than is necessary at any given university. The CTM addresses these shortcomings and allows a student to complete a subset of general education, with no unnecessary repetition of completed coursework, and it allows students to take only courses guaranteed to transfer as general education at any Oregon public university. Additionally, Core Transfer Maps have a built-in advising requirement—students interested in pursuing a major that is Science, Technology, Engineering, or Math (STEM) oriented will be directed toward appropriate Mathematics and Natural Sciences courses—and students who know they are not pursuing a STEM path will be directed toward an appropriate more general path with more Social Science courses (see Figure 1).

Figure 1.

Oregon Transfer Compass

CORE TRANSFER MAPS

The Core Transfer Maps are broad descriptions of course requirements for students at any Oregon community college or public university. Students who have not yet declared a major and plan to transfer may take classes that fit these categories at any Oregon community college and expect all classes to transfer and meet at least 30 credits of general education requirements for a bachelor's degree at any Oregon public university.

Note that many majors have specific course requirements for categories within the Core Transfer Maps. The Core Transfer Maps are intended as starting points for students who plan to transfer to a university, but are unsure of their intended major or transfer destination. Students who are certain of their major, but not their transfer destination, should determine if there is a developed Major Transfer Map for their chosen discipline, and follow that as a guide. Students who are certain of both their major and their intended transfer destination should consult an advisor for information on an existing specific articulation agreement, Major Transfer Map, or degree map that will prescribe their course requirements.

COURSE DISTRIBUTION REQUIREMENTS
See an advisor for recommended courses

Subject	General Core Transfer Map	STEM Core Transfer Map
Writing	WR121 (3-4 credits)	WR121 (3-4 credits)
Arts & Letters	2 courses (6-8 credits) See list of AA/OT outcome courses. ** See an advisor for recommended courses.*	2 courses (6-8 credits) See list of AA/OT outcome courses. ** See an advisor for recommended courses.*
Social Sciences	2 courses (6-8 credits) See list of AA/OT outcome courses. ** See an advisor for recommended courses.*	2 courses (6-8 credits) See list of AA/OT outcome courses. ** See an advisor for recommended courses.*
Natural Sciences	2 courses with labs (8-10 credits) See list of AA/OT outcome courses. ** See an advisor for recommended courses.*	2 courses with labs (8-10 credits) See list of AA/OT outcome courses. ** See an advisor for recommended courses.*
Math	1 course (4-5 credits) See list of AA/OT outcome courses. ** See an advisor for recommended courses.*	1 course (4-5 credits) See list of AA/OT outcome courses ** See an advisor for recommended courses.*

ADDITIONAL REQUIREMENTS

Subject	General Core Transfer Map	STEM Core Transfer Map
Cultural Literacy	At least 1 required course must also meet the Cultural Literacy outcomes.	At least 1 required course must also meet the Cultural Literacy outcomes.
At Least 30 Total Credits	If the credit total for the required courses is less than 30 credits, select a course of your choice from the AA/OT outcome courses. ** See an advisor for recommended courses.*	If the credit total for the required courses is less than 30 credits, select a course of your choice from the AA/OT outcome courses. ** See an advisor for recommended courses.*
Completion standards	All courses must be passed with a grade of "C–" or better. Students must have a minimum cumulative GPA of 2.0 at the time of award.	All courses must be passed with a grade of "C–" or better. Students must have a minimum cumulative GPA of 2.0 at the time of award.

COMPLETED CORE TRANSFER MAPS

Subject	General Core Transfer Map	STEM Core Transfer Map
Total	At least 8 courses (at least 30 credits)	At least 8 courses (at least 30 credits)

Oregon Transfer Compass | Office web address or other contact info (optional) | Date of publication

MAJOR TRANSFER MAPS

Under HB 2998 (2017), the HECC was also charged with convening Oregon community colleges and public universities to create discipline-specific Unified Statewide Transfer agreements, now called Major Transfer Maps. Major Transfer Maps, or "MTMs," are designed to be a major-specific course plan that students can complete at any community college in Oregon. They are intended for students who know what they want to major in and who plan to transfer from an Oregon community college to an Oregon four-year public university that offers a bachelor's degree in that specific major.

The MTM significantly departs from prior transfer tools such as the AAOT and the ASOT, which were either overly complex or contained too much general education for a given university. Additionally, because both the AAOT and the ASOT were designed for broad transferability, students missed specificity, such as foundational courses that would better prepare them for a major, and save them time and money. The MTM is designed so that it contains the CTM—a streamlined flexible core of at least 30 credits of general education, and when an MTM is completed, it allows students to transfer to any Oregon public university with the optimal number of credits that can be taken at a community college in a specific major that are guaranteed to transfer and count toward a bachelor's degree in that major (provided they meet transfer entrance requirements for the university).

IMPLEMENTATION PROGRESS

On April 6, 2018 HECC staff hosted an MTM Launch meeting where members of the first four MTM workgroups—biology, business, English literature, and elementary education— heard from university and community college leadership, students, HECC staff, and Transfer Workgroup members about the importance of improving student transfer, HB 2998's legislative charge, student transfer data in Oregon, implementation work completed thus far, and next steps. The HECC then convened a Major Transfer Map Workgroup for each of the four disciplines selected by the Transfer Workgroup, and work on each MTM began. Currently, each group has met between four and eleven times and all of the legislatively mandated deadlines for each MTM have been met: OTAC approved the Biology USTA on November 27, 2018 before the state-mandated deadline of December 1, 2018; OTAC approved the English Literature (BA) USTA on March 15, 2019 before the state-mandated deadline of April 1, 2019; and OTAC approved the Elementary Education (BS) USTA on October 18, 2019 before the state-mandated deadline of December 1, 2019.

Biology

The Biology MTM workgroup was comprised of faculty and advisors from community colleges and public universities—many of whom knew each other and had been meeting through a longstanding affinity group. In part because the group was familiar with each other and with the similarities and differences across each institution's biology curriculum, the group was able to generate an MTM in just five meetings.

The Biology MTM prioritizes completion of lower-division sequences in Biology, Chemistry and Algebra and Trigonometry, but it also allows for some flexibility with options for student to complete Organic Chemistry, Physics or Calculus (see Figure 2). The MTM also requires transfer students to complete foundational coursework in science and math that will prepare them to begin the same upper division coursework as their university peers who began coursework at a university. Additionally, while the full MTM total is between 90-100 credits, like all MTM's it contains a CTM of at least 30 credits (credits vary by the credits awarded by class

across institutions) with recommended general education courses that both transfer to all universities and better prepare students for the biology major.

While the biology group worked quickly, they had to overcome some key challenges. For example, the content in a science series does not match by term, but once a sequence is completed, it will transfer to public universities. The biology group was able to overcome this challenge by recommending that if students begin a sequence of courses, they complete it at the same institution to ensure that all content is covered. Additionally, the group deliberated over how best to present math requirements: while many biology students pursue a pre-professional path which typically requires calculus, other students who are pursuing a different path in biology may not need calculus. The MTM group did not want a calculus requirement to deter students from becoming biology majors, or cause them to get stuck in long developmental math sequences. In the end they decided to prioritize calculus, but include a note and advising points to alert students that calculus alternatives, such as statistics, are available at some public universities (see Figure 2). The key components of the Biology MTM can be seen in Figure 2. The group also developed a series of recommended electives, but recently decided they to revisit and revise them so they are not included in Figure 2.

Figure 2.

Oregon Transfer Compass

MAJOR TRANSFER MAP: B.S. IN BIOLOGY

The Biology Major Transfer Map (MTM) outlines Oregon community colleges coursework to complete in order to transfer seamlessly to any Oregon four-year public university to earn a bachelor's of science (B.S.) in biology. The Biology MTM is intended for students who know they want to transfer and earn a B.S. in biology, but who are unsure of their intended transfer destination. Students should work with their community college advisor to ensure they properly fulfill the requirements of this Biology MTM.

Students who complete courses that fit the listed Biology MTM categories and complete all science series coursework at one school can expect that all of their courses will transfer into general education or major requirements at any Oregon public university. Students who complete all of the listed coursework and have a total of 90 credits can also complete an Associate of General Studies (AGS) degree http://handbook.ccwdwebforms.net/handbook/definitions/associate-degrees/associate-of-general-studies-(ags). Because completion of the listed coursework or an AGS degree is not required, students can transfer to their intended university at any time. The optimal transfer time will generally be a fall term when students have **completed any science series in progress, and that is a more important consideration than having all of the listed courses** or categories completed. **The course substitutions and recommendations listed below should only be considered by students who are certain of both their intended major and transfer destination**.

Note that in order for a student to successfully transfer to an Oregon public university, students must: 1) earn a grade of a "C -" or better in courses in the major; 2) take courses in the major for a grade—they will not be accepted as "pass/no pass"; and 3) earn a cumulative grade point average of 2.0. Students must also regularly meet with an advisor. Students are strongly encouraged to: 1) seek advising before their first term of college; 2) seek advising after they have completed the 27-35 credits of the Core Transfer Map; and 3) seek advising and meet with a transfer coordinator before registration opens at the beginning of the students second year in college. Students should also be aware that if they want to complete this Major Transfer Map in two years, they should take an average of 45 credits per year, or approximately 15 credits per quarter. Finally, to earn at Associates of General studies, students will need to successfully complete at least 90 credits.

All seven public university in Oregon offer a biology B.S. degree:
Portland State University (https://www.pdx.edu/biology/biology-major-requirements)
University of Oregon: (https://www.eou.edu/biology/)
Eastern Oregon University: (https://www.eou.edu/biology/)
Oregon Institute of Technology: (https://www.oit.edu/academics/degrees/health-sciences)
Oregon State University: (https://catalog.oregonstate.edu/college-departments/science/school-life-sciences/integrative-biology/biology-bs-hbs/)
Southern Oregon University: (https://sou.edu/academics/biology/programs/biology-ba-bs/)
Western Oregon University: (http://www.wou.edu/biology/degrees-programs/biology-major-requirements/)

CORE TRANSFER MAP *See an advisor for recommended courses before your first term*		
Writing		
1 course	WR121	3-4
Arts & Letters		
1st course	Choose from AAOT-approved courses	3-4
2nd course	Choose from AAOT-approved courses	3-4
Social Sciences		
1st course	Choose from AAOT-approved courses	3-4
2nd course	Choose from AAOT-approved courses	3-4
Natural Sciences		
1st course	Biology 211[1] [1] Biology 211, 212, and 213 must be taken at the same institution	4-5
2nd course	Biology 212[1] [1] Biology 211, 212, and 213 must be taken at the same institution	4-5
Mathematics		
1 course	Math 111[1] [1] Students who test out of Math 111 may substitute a recommended elective (see page 2).	4-5
At least 1 Core Transfer Map course must also be an AAOT-approved Cultural Literacy course		
Core Transfer Map Total		***27-35***

ADDITIONAL MAJOR TRANSFER MAP COURSES *See an advisor for recommended courses*		
General Education		
Writing	Writing 122 or Writing 227 *OSU accepts either but recommends 227 *WOU & UO accepts either but recommends 122	3-4
Math	Math 112[1] [1] Students who test out of Math 112 may substitute a recommended elective (see recommended electives listed below).	4-5
Major Requirements		
Biology	Biology 213[1] [1] Biology 211, 212, and 213 must be taken at the same institution	4-5
Chemistry	3-course General Chemistry sequence with lab	12-18
Physics/Math/Chemistry	PICK TWO SEQUENCES *Strongly recommend seeing an advisor for assistance with choosing sequences which best match your specific academic, pre-professional, and career goals* • **3-course General Physics (algebra or calculus)** • **MTH 251 & 252[1,2]** • **3-course Organic Chemistry sequence[3,4]** [1] Students transferring to PSU may substitute MTH 243 & 244 for MTH 251 & 252. [2] Students transferring to EOU may substitute MTH 243 for MTH 252. [3] Students considering pre-medical, pre-dental, and pre-pharmacy programs should consider Organic Chemistry sequence. Courses in sequence must be taken at the same institution. [4] Organic Chemistry sequence is strongly recommended for all transfers to OSU.	20-33
Additional MTM Courses Total		47-65
Electives	Elective courses to reach 90 credits (see recommended electives listed below)	0-16
MAJOR TRANSFER MAP TOTAL		90-100

Elementary Education

The Elementary Education MTM Workgroup met 11 times either as a whole group or separately by sector. The group faced significant challenges from its inception. Specifically, some of the public universities had elementary education programs built mostly or entirely into two-year upper division programs, with little to no lower-division credit bearing courses. However, with support from the director of the Teacher Standards and Practice Commission, HECC staff, and continued deliberation, the group was able to arrive at a solution that allowed for the creation of an MTM. The group created an MTM with 70 credits of general education and five Education courses—three of which must be accepted toward the major at a public university while the remaining Education courses can count toward electives.

The Elementary Education MTM is unique in that a high number of general education courses are necessary to prepare students for success in licensing requirements such as state licensing tests (Oregon Educator Licensure Assessments Courses (ORELA) subtests 1 and 2). Because of the high number of general education courses required, the group recommended that the MTM be housed in an Associate of Arts Oregon Transfer degree (AAOT). The AAOT enables students to transfer with the guarantee that their lower-division general education requirements have been completed, but it also has enough flexibility that the Education courses fit into the degree. This means that students who pursue the Elementary Education MTM with an AAOT can transfer with junior standing the major, well-prepared for ORELA exams, and with no remaining lower-division general education requirements (see Figure 3).

Figure 3.

Oregon Transfer Compass

MAJOR TRANSFER MAP: ELEMENTARY EDUCATION (BS)

This Major Transfer Map outlines specific course requirements for students at any Oregon community college who plan to transfer to a four-year public university and earn a Bachelor's of Science in Elementary Education. Students may take classes that fit these categories at any Oregon community college and expect all classes to transfer into general education or the major at any Oregon public university. This map is intended for students who know they want to transfer and earn a Bachelor's of Science in Elementary Education, but who are unsure of their intended transfer destination. Students should work with an advisor to ensure they fulfill the requirements of this major transfer map. Students who are certain of both their major and their intended transfer destination should consult an advisor for information on an existing specific articulation agreement or degree map that will prescribe their course requirements. If a student is seeking a Bachelor's of Arts in Elementary Education they should work with an advisor. ***Students should also be aware that not all programs offer licensure and should work with an advisor to identify the program that is right for them.***

This MTM prepares students for the following four-year, elementary education programs: Eastern Oregon University (licensure), Oregon State University-Hybrid Online Program (licensure, available in 2021)[1], Oregon State University-Cascades (licensure), Southern Oregon University (licensure & non-licensure), Western Oregon University (licensure), and University of Oregon (non-licensure). Students who successfully complete this MTM and are admitted into one of the aforementioned programs, will be guaranteed a 90-100 credit path to complete their bachelor's degree in elementary education.

Students who complete all of the listed coursework and have a total of 90 credits can also complete an Associate of Arts Oregon Transfer (AAOT) degree http://handbook.ccwdwebforms.net/handbook/definitions/associate-degrees/associates-of-arts-oregon-transfer-(aa-ot). Interested student should contact their advisor for more information.

Note that in order for a student to successfully transfer to an Oregon public university, students must: 1) take courses in the major for a grade—they will not be accepted as "pass/no pass"; 2) earn a cumulative grade point average of at least 2.75 overall; and 3) be aware of the different course grade and cumulative GPA requirements in the major at each university (see information on page 2 of this document). Students must also regularly meet with an advisor. Students are strongly encouraged to: 1) seek advising before their first term of college; 2) seek advising after they have completed the 27-35 credits of the Core Transfer Map; 3) seek advising when they know they want to pursue elementary education; and 4) seek advising and meet with a transfer coordinator before registration opens at the beginning of the students second year in college. Students should also be aware that if they want to complete this Major Transfer Map in two years, they should take an average of 45 credits per year, or approximately 15 credits per quarter. Finally, to earn the Associate of Arts Oregon Transfer in Elementary Education, students will need to successfully complete at least 90 credits.

CORE TRANSFER MAP *See an advisor for recommended courses and to learn about professional Elementary Education application processes*		
Writing		
1 course	WR121* ** A student must have eight credits of Writing to satisfy the AAOT requirements or they will need to take a third writing course*	3-4
Arts & Letters		
1st course	ENG 104, 105, or 106	3-4
2nd course	Intro to Drawing or Intro to Design	3-4
Social Sciences		
1st course	HST 201, 202, or 203	3-4
2nd course	World/Cultural Geography or Cultural Anthropology	3-4
Natural Sciences		
1st course	Biological Science w/lab (ORELA prep course, often Bio 101)	4-5
2nd course	Earth Sciences w/lab	4-5
Mathematics		
1 course	MTH 211	4-5
****At least 1 Core Transfer Map course must also satisfy Cultural Literacy outcomes for AAOT* ***** Courses must total minimum of 30 credits, can be filled by an elective credit if needed*		
Core Transfer Map Total		***30-35***

ADDITIONAL GENERAL EDUCATION COURSES *See an advisor for recommended courses and to learn about professional elementary education programs and application processes*		
Writing	WR 122* ** A student must have eight credits of Writing to satisfy the AAOT requirements or they will need to take a third writing course*	3-4
Communications	COMM 111	3-4
Arts & Letters	Select from AAOT outcomes • *Students interested in the WOU 4 Yr. licensure program can also take linguistics* • *200-level world languages also recommended*	3-4
3rd Social Science	American Government	3-4
4th Social Science	Psychology class PSY 201 or 202	3-4
Natural Sciences	3rd lab Science from AAOT course list w/lab or discussion section	4-5
Math	MTH 212	4-5
Math	MTH 213	4-5
Health	Health and Wellness	2-3
Section Total		29-38

EDUCATION COURSES* ** Each public university will accept at least 3 out of the 5 courses as meeting major requirements. One of those 3 must be Education Foundations/Introduction to Education* *See an advisor for recommended courses and to learn more about professional elementary education programs and application processes*	
Education Foundations/Introduction to Education	3-4
Child Development/ Learning & Development	3-4
Multicultural Education/Culturally Responsive Pedagogy	3-4
Special Education	3-4
Practicum	3
Section Total	15-19
Grand Total	**74-92**
ELECTIVES	
Elective courses to reach 90 credits (See recommended electives on page 3)	0-16
MAJOR TRANSFER MAP TOTAL	90-100

4 Yr. Licensure and Non-Licensure Programs *See an advisor for recommended courses and to learn more about these programs and the application processes*					
4 Yr. Licensure Programs					**Other Degree Programs**
SOU-4 Yr. Licensure & Non-licensure	WOU-4 Yr. Licensure	EOU-4 Yr. Licensure	OSU Cascades-4 Yr. Licensure	OSU-Hybrid Online Licensure (program available in 2021)	UO- 4 Yr. Non-licensure (to obtain a teaching license students must apply to a graduate degree and licensure program)
SOU requires a 2.75 GPA for entrance and nothing less than a C- in any required course (education or otherwise). Exceptions made on a case by case basis.	All "ED" prefix courses (or courses that sub in for ED prefix courses) must be a B- or better. Students need to have a 2.75 by the time they apply for the "Ed program" at the end of junior year.	Preference for cumulative GPA of 3.0, exceptions made on a case by case basis. Education courses must have a C- or better to transfer.	Preference for cumulative GPA of 3.0, exceptions made on a case by case basis. Education courses must have a C or better to transfer.	Minimum course grade is a C and GPA requirement is 3.0. Exceptions may be made and students may be conditionally accepted on a case by case basis. OSU will provide conditionally accepted students	Minimum cumulative GPA for admissions consideration is 2.75. Exceptions may be made on a case by case basis. Education courses must have a C- or better to transfer.

English Literature

The English Literature Major Transfer Map (MTM) presented to OTAC on March 15, 2019 prioritizes lower-division English courses and world/second language degree requirements; provides students with optional guidance over general education course-taking; and preserves the same level of course-taking flexibility that direct-enrollment students benefit from. The group arrived at this path after meeting four times total, beginning with the first meeting on May 11, 2018. The community college members also met once separately on January 18, 2019 to discuss issues that uniquely impact them.

The current path specifies approximately 34-71 credits.[11] It features a Core Transfer Maps (CTM) portion of 21-35 credits which includes the suggestion that students take two, 200-level English courses to help fulfill the "Arts and Letters" requirement of the CTM. The total does not add up to 30 because Oregon State University only allows credits to count either toward the major or toward general education, but not both. Initially, the group sought to add more general education to the MTM in order to get closer to 90 credits and to enable all institutions to fulfill the CTM portion of the map. However, the group decided to privilege flexibility over

[11] The large range reflects differences in required and accepted 2nd language courses.

specificity in part because direct enrollment (non-transfer) students have the ability to freely choose both a minor and general education courses and the group felt it was important for transfer students to have that freedom too. Additionally, few general education courses could be identified that could transfer to all relevant public universities and not result in excess credits. The key components of the MTM can be seen in Figure 4. For the full MTM including the recommended additional courses to reach 90 credits, see Appendix C.

Figure 4.

CORE TRANSFER MAP ***See an advisor for recommended courses before your first term***		
Writing		
1 course	WR121	3-4
Arts & Letters		
1st course	200-level literature from AAOT course list* **If students take American or British survey courses they will count toward major requirements at WOU* ***At EOU, SOU, UO & PSU this course also counts toward major requirements (at PSU up to 12 credits of 200-level Eng. literature can count toward the major)* ****At OSU this course only counts toward the major and students will need to take another Arts and Letters course*	3-4
2nd course	200-level literature from AAOT course list* **If students take American or British survey courses they will count toward major requirements at WOU* ***At EOU and SOU this course also counts toward major requirements, at PSU up to 12 credits of 200-level Eng. lit can count toward the major* ****At OSU this course only counts toward the major and student will need to take another Arts and Letters course*	3-4
Social Sciences		
1st course	Select from AAOT course list	3-4
2nd course	Select from AAOT course list	3-4
Natural Sciences		
1st course	Lab Science from AAOT course list	4-5
2nd course	Lab Science from AAOT course list *****at PSU counts toward UNST placement (see footnote on last page)*	4-5
Mathematics		
1 course	MTH 105 or Higher *****not required at PSU counts toward UNST placement (see footnote on last page)*	4-5
At least 1 Core Transfer Map course must also satisfy Cultural Literacy outcomes for AAOT		
Core Transfer Map Total		***27-35***
ADDITIONAL GENERAL EDUCATION COURSES ***See an advisor for recommended courses***		
Writing	WR 122	3-4

ENGLISH LITERATURE COURSES *See an advisor for recommended courses*		
Literature A	Eng 2xx Shakespeare	3-4
Literature B	Eng 2xx (course from American or British Survey)	3-4
English Literature Total		***6-8***
BACHELOR'S DEGREE REQUIREMENTS ***See an advisor for recommended courses***		
2nd Language	Through 203 or end of 2nd year or higher, C- or better in last course**** *Note: At EOU, PSU, UO & WOU this fulfills both a degree requirement and some general education* ******Students without any second language credits should begin the 100-level sequence in their first year at a community college. Students should complete language requirements before transferring. Students transferring to EOU should be aware that they only offer Spanish. Students may also be able to demonstrate proficiency through an exam or other means.*	4-24
MTM Total		***40-71***
ADDITIONAL COURSES TO REACH 90 CREDITS ***See an advisor for recommended courses***		
At this point [above = 40-71 credits], it is recommended students pursue these options:		
1. Take courses that will apply to their minor of choice, that will transfer to the Oregon public university of their choice (work with an advisor)		
2. Take courses that will apply to the general education or the major at the Oregon public university of their choice (work with an advisor)		
3. Take electives to reach 90 credits, that will transfer to the Oregon public university of their choice (work with an advisor)		

Business

The Business MTM group has met a total of five times and continues to deliberate over the best way to create an MTM for a major that contains diverse areas of specialization, in a university landscape where not all institutions offer the same areas of specialization. Furthermore, the group has voiced a strong preference to create a more general business MTM—rather than focus in on a particular area—over concerns that asking students to specialize too early could force them to choose an area of business before they gain an understanding of the full range of options available to them. However, remaining broad may necessitate multiple paths/variances on the MTM because math requirements and some key business requirements differ significantly across universities. For example, the statistics course, Math 243 is required by all seven universities, the more advanced statistics course, Math 244 is required by 5 of 7 universities, and College Algebra (Math 111) is required by 4 of 7. To complicate matters further, for some public universities, both Math 243, and 244 are only required because the content of a single course at a community college does not match the content of a single 244 course at a university. This means community college students must take two courses to equal one at a university. Other key courses such as Introduction to Business and Business Law are required at most, but not all of the public universities.

Some progress has been made, however. A recent meeting with a subset of universities led to the development of a potential MTM for the subset. The group will revisit this potential MTM, along with the challenges, at the launch meeting this winter.

IMPLEMENTATION CHALLENGES

Higher education institutions in Oregon are highly decentralized organizations. All 24 institutions are governed by independent boards, and all have the authority to develop general education, major, and institutional requirements based on a variety of factors including: institutional mission, essential foundational and disciplinary knowledge required for program coherence at various levels of degree achievement, and student-employer-region-state needs. The benefits of this variance/diversity reflect mission differentiation but also make credit transfer challenging and approximate rather than simple and singular. As was outlined in the "Challenges with Implementing HB 2998" document presented to the commission in February of 2019 and included here in the interest of a thorough report, the following challenges to implementation have been identified:

Authority

The authority to determine curricular content resides with the faculty. This means that each higher education institution or department can set curricular requirements that are different from those of similar departments at other universities or community colleges. What this means for the development of Major Transfer Maps (MTMs) is that when departments that are outliers are unwilling to change their requirements, it leads to MTMs that build extra credit into them by requiring all students take the course(s) required by one institution. Where there is little agreement about courses or content, it can also lead to MTMs that are so general as to be unhelpful for students. While HB 2998 clearly articulates the requirement that community colleges and public universities develop unified statewide transfer agreements, it does not provide a clear path towards resolving institutional disagreements.

Workgroup Design

MTM workgroups were designed to bring together faculty and advisors with disciplinary expertise in order to build consensus about what knowledge and courses are required for a student to enter a university as a junior in the major. In some instances, these individuals are not sufficiently empowered, even with consultation with their home institutions, to represent their departments and to negotiate changes to major requirements that would bring requirements into greater alignment. Additionally, major requirements exist alongside general education requirements. MTM workgroup members are experts in their disciplines, but do not necessarily have expertise in or authority over, institutional general education requirements. One of the barriers to creating common MTMs is variance in general education requirements across the seven public universities. While Core Transfer Maps (CTMs) were intended to help streamline general education credit transfer, CTMs are only a 30-35 credits subset of general education. Therefore, when we are trying to build an MTM, we often have to look at additional general education requirements across universities.

Curricular Variance

Courses with the same course number and title do not contain the same content across all community colleges or universities. This leads to situations such as financial accounting in business where Portland Community College students need to take BA 211 (3 credits) and BA 212 (3 credits) to equal BA 211 (4 credits) at Oregon State University to cover all of the same modules. HB 2998 explicitly states that community colleges and public universities shall develop unified statewide transfer agreements that "enable a student to transfer from a

community college to a public university without the loss of academic credit or the requirement to retake a course at a public university that the student has successfully completed at a community college."

Where there is agreement about skills and content students must master, there may still be differences in which courses contain those skills and content. This applies to course sequences, especially in the sciences. When the content is organized differently across terms, and students transfer mid-sequence, they may need to retake the entire sequence (this is the case for Biology). A non-sequenced example is that all business programs expect their students to develop skills with Excel, but that content is in a range of different courses.

Departments in the same discipline at different universities do not have a shared vision on what skills students must master by the junior year. Business departments, for example, do not agree on what level of math is necessary for entry to the major or graduation from the university. For example, University of Oregon and Oregon State University's schools of business emphasize financial analysis, which requires calculus. However, Eastern Oregon University does not have a finance track and therefore does not require calculus. Some university faculty expressed concern over the rigor of community colleges courses and wish to maintain the practice of accepting two community college courses as the equivalent of one university course, or three community college courses as the equivalent of two university courses. This issue has been addressed. It is also clear that it is not permissible under HB 2998.

Capacity and Sustainability

Rural and/or small community colleges are not able to offer all the courses identified in the MTMs due to lack of available faculty and/or low enrollment. A student enrolled at a small college will need to transfer earlier, or enroll in more than one institution, to complete MTM requirements. Also, higher education institutions writ large, and departments specifically, depend on student enrollment and tuition for support. There is the perception that greater acceptance of community college courses may lead to lower enrollments in courses at universities and decrease their available funds and consequently undermine their sustainability.

CONCLUSIONS AND RECOMMENDATIONS

CONCLUSIONS

House Bill 2998 is in its second year of implementation. Since the last report to the legislature in January of 2018, the HECC and the Oregon Transfer and Articulation Committee have completed the following:

• Created and implemented foundational curricula;

• Formed a new transfer advisory group: the Oregon Transfer and Articulation Committee;

• Rebranded HB 2998 transfer tools;

• Approved three Major Transfer Maps before state-mandated deadlines (Biology, Elementary Education, and English Literature);

• Reviewed and provided recommendations on memorandums of understanding drafted for MTM's;

• Reviewed and provided recommendations on MTM variance guidance document—a document that establishes agreed upon standards and principles of curricular variance in MTMs;

• Recommended new MTMs for the next cohort of implementation: Computer Science, Criminal Justice, and Business and;

• Recommended the creation of transfer associate degrees for newly developed major pathways.

While the HECC, OTAC, and MTM Workgroups have significantly advanced the work of HB 2998, much more work is needed. Three MTMs must be created annually, the HECC will work with institutions to create new two-year degrees for the MTMs, the HECC and OTAC will work with communications consultants and institutional communications offices to develop a student-friendly communications plan, and the HECC and OTAC will continue to research the technology needed to ensure that students, families, advisors, and faculty have clear information about how courses transfer between community colleges and universities in Oregon. Given the ambitious agenda of the HECC and OTAC, and in light of the ongoing implementation challenges, the HECC and OTAC have identified a number of recommendations.

RECOMMENDATIONS

Funding for HECC Staff Work

While the HECC received funding for one full-time, permanent staff member which significantly improved HECC's capacity to continue to serve as a convener and coordinator for the future of this transfer work, the HECC will need to continue to meet its reporting requirements under HB 2998, namely, the directive that, "[t]o the extent relevant data is available, the commission shall report annually to the Legislative Assembly on whether existing unified statewide transfer agreements are meeting the goals set forth in section 3 (2) of this 2017 Act." However, for the HECC to complete this work, it requires additional funding for a research analyst position. Funding for a research analyst position would enable the HECC to continue to provide high quality reporting, as well as to make data available to support ongoing transfer work.

Creation of a student-facing online transfer portal

Consistent with the last post secondary student transfer report to the legislature, HECC reiterates the need for a statewide transfer navigation system for students and advisors. Thirty-nine states have such an online database for students to find their way from one institution to another in a given transfer pathway. HECC has advocated for such a statewide system since its report on House Bill 2525 (2015). The creation and maintenance of such a system raises numerous technical and policy questions that must be addressed before HECC or any institution can create and implement it. Not all institutions use the same registration systems. It would require a nearly unprecedented level of coordination among Oregon's institutions in addition to sufficient funding to build and maintain. But it can be done and has been done in other states. Further, such coordination would have benefits for transfer students beyond maintaining the data system. HECC recommends the creation of a technical workgroup made up of registrars, advisors, and IT professionals to evaluate the functional needs and technical requirements for a student-facing transfer portal, and to receive proposals for its creation and implementation.

Funding for Faculty Convening

After the approval of each Major Transfer Map, the HECC received informal feedback from MTM workgroup members that this work represents one of their heavier service loads, and while they think the work has started important intra-disciplinary conversations, and has led to major-specific transfer tools, balancing the work with their other paid obligations proved challenging. Meetings typically last three hours, in addition to the distance MTM members travel to attend, and MTM meetings often required pre-work and post work. While some faculty reported getting a course release and travel reimbursement, this was not the case for all who responded. HECC recommends funding for faculty convening to offset the cost in faculty and staff time and travel costs that institutions incur for the many hours they devote to this work.

APPENDIX A.

OTAC CHARGE

Oregon Transfer and Articulation Committee
Overview

I. Purpose/charge
The Oregon Transfer and Articulation Committee (OTAC) was created in 2018 as a merger of the Joint Transfer and Articulation Committee (JTAC) and the House Bill 2998 Transfer Workgroup. OTAC acts as an advisory body to the staff of the Higher Education Coordinating Commission (HECC), and provides information and recommendations to Oregon's community colleges and universities on matters related to postsecondary student transfer.

II. History and Context
In 1992, the Joint Boards Articulation Committee (JBAC) was established to promote cooperation and collaboration among all education sectors in Oregon: K-12, community colleges, and baccalaureate-granting institutions. In 2015, following the reorganization of Oregon's governmental education bodies and establishment of the HECC and its supporting agency, JBAC was disbanded and replaced with JTAC. Whereas JBAC acted as a direct advisory body to HECC commissioners and engaged in some commission-level work, JTAC advised HECC agency staff and shifted its commission-level work to the HECC's Student Success and Institutional Collaboration (SSIC) Subcommittee.

House Bill 2998, passed in 2017, required the HECC to convene community colleges and public universities listed in ORS 352.002 to:

1) Develop one or more Core Transfer Maps of at least 30 college-level academic credits that will count toward degree requirements, with the goal that students will not have to repeat lower division general education coursework after transfer; and
2) To establish Major Transfer Maps that will allow students to move more easily from community college to university, in a given major, with no lost credit or unnecessary repeated coursework. The HECC and its community college and university partners are to select the initial major disciplines for Major Transfer Map establishment and publish the criteria used to make that decision.

To fulfill these mandates, the HECC convened the Transfer Workgroup, comprising community college and public university faculty, advisors, and administrators, as well as representatives of key affinity groups.

During the course of the HB 2998 Transfer Workgroup's work, it became clear that a formal group needed to be established to continue the coordination, advising, and maintenance of Oregon's transfer policies, tools, and communications. While JTAC performed many of these duties, though not in regard to the products of HB 2998, there was concern that JTAC lacked the representation, particularly of institutional faculty, to fulfill this role. JTAC and the Transfer Workgroup agreed to merge and form a new body: OTAC

III. Authorities/responsibilities

OTAC ensures effective coordination and collaboration among sector leaders and provides information and recommendations to HECC staff, universities, and community colleges on issues related to postsecondary student transfer. Specifically, OTAC performs the following roles:

Maintaining Alignment of Transfer Tools and Degrees

- Monitors the operation of Oregon's statewide transfer tools and degrees, including the:
  - Core Transfer Maps,
  - Oregon Transfer Module (OTM),
  - Associate of Arts/Oregon Transfer (AAOT),
  - Associate of Science/Oregon Transfer-Business (ASOT-B),
  - Associate of Science/Oregon Transfer-Computer Science(ASOT-CS), and
  - Major Transfer Maps
- Developing processes to maintain alignment of statewide transfer tools and degrees.
- Identifies need for modifications to statewide transfer tools and degrees and/or development of new tools and degrees.
- Reviews proposed Major Transfer Maps and makes recommendations to Major Transfer Map workgroups.
- Recommends specific modifications to:
  - Core Transfer Maps,
  - OTM, and
  - AAOT
- Directs curricular issues to the appropriate institutional faculty groups
- Makes recommendations to HECC staff and stakeholders on how to improve credit transfer in Oregon.

Communication and Coordination

- Issues guidance on notating the Core Transfer Maps on institutional transcripts.
- Promotes awareness of Oregon's statewide transfer tools particularly the Core Transfer Maps and Major Transfer Maps among faculty, staff, and students.
- Identifies the order of disciplines for Major Transfer Map development and convenes workgroups to develop new Major Transfer Maps
- Convenes annual statewide meeting on general education outcomes and the Core Transfer Maps.
- Convenes annual discipline-specific meetings to review existing Major Transfer Maps.
- When necessary, convenes stakeholder representatives to discuss and make recommendations on specific postsecondary student transfer-related topics.

Mediation

- Reviews complaints submitted to the HECC to OTAC regarding Oregon's statewide transfer tools and degrees.
- Recommends next steps that support dispute resolution.

Policy Consultation

- Acts as a consultation forum for problem-solving, referral and feedback relevant to postsecondary articulation and transfer issues.

- Reviews transfer and articulation topics and issues as they emerge from the field, the HECC, and the legislature. OTAC will consult and work with representatives from K-12, community colleges and public universities to identify questions, concerns, and gaps in existing practice or policy, and may submit to SSIC proposals for new programs or approaches.
- When appropriate, consults with external individuals or groups (that is, groups in other states or in Oregon but beyond the higher education administration) with experience that may improve our articulation and transfer practices.

Specific Areas of Focus

A. Articulation and transfer
- Statewide transfer tools and degrees
- Emerging curricular trends that may affect students upon transfer (e.g. guided pathways)
- Course equivalencies
- Reviews annual policy for International Baccalaureate (IB) and Advanced Placement (AP) exams and coursework, as it pertains to postsecondary transfer.

B. Aligned curriculum development
- Coordinating cross-sector faculty involvement in curricular design
- Coordinating faculty review of outcomes-based General Education framework as it pertains to statewide transfer
- Alignment of K-12 outcomes with readiness for academic work at the college and university level

C. Intersector representation and collaboration
- Discuss the implications of legislative changes and statewide initiatives, and disseminate information to OTAC members' constituencies
- Provide representation to inform next steps in statewide initiatives on articulation, transfer, placement or other issues as needed
- Serve as liaisons to statewide sector- and role-specific groups on intersector transfer and articulation topics

IV. Membership

The composition of OTAC is designed to facilitate collaboration across functional roles in Oregon's postsecondary sector. While OTAC strives for membership from a diversity of colleges and universities, members will represent their functional role, not their institution. Membership includes:

- 2 representatives of the Community College Council of Instructional Administrators
- 1 representative of the Public University Provost Council
- 1 Provost or other representative of the Oregon Alliance for Independent Colleges and Universities
- 1 representative of the Community College Council of Student Services Administrators
- 1 representative of Public University Registrars
- 1 representative of Community College Registrars
- 1 representative from a public university with a transfer/articulation-specific role
- 1 representative from a community college with a transfer/articulation-specific role

- University and community college faculty (equal representation between sectors)[12]:
    - OWEAC Chair
    - Chair of the Math chairs group
    - 1 IFS representative
    - 1 representative from each of the first four Major Transfer Map workgroups (biology, business, education, and English)
    - 4 members from the Transfer Workgroup
- 2 community college advisors
- 1 university advisor
- 1 university institutional researcher
- Staff liaisons from the HECC Office of Community Colleges and Workforce Development, HECC Office of University Coordination, and Oregon Department of Education

VI. HECC responsibilities

The HECC will help support the work of OTAC through convening and supporting OTAC meetings. The HECC will assist with meeting logistics such as scheduling and organizing the location. Furthermore, HECC staff will assist with creating materials, agenda-setting, maintaining records, and a maintaining a web presence as needed.

[12] The faculty membership listed here pertains only to the 2017-19 biennium. OTAC will use the rest of this biennium to assess the faculty needs of the Committee and make changes to the membership policy where needed.

APPENDIX B.

GENERAL EDUCATION OUTCOMES

OUTCOMES AND CRITERIA FOR TRANSFERABLE GENERAL EDUCATION COURSES IN OREGON

Approved by the Joint Boards' Articulation Committee On November 9, 2009; approved by the Councils of Chief Academic Officers and Provosts on November 13, 2009; approved by Unified Educational Enterprise on November 23, 2009; approved by the Joint Boards of Education on January 7, 2010.

Background

This work was inspired by the need to identify the fundamental principles that shape General Education in colleges and universities throughout Oregon. The intent was to use the principles in two ways: (1) to create a rational basis for determining the equivalency of courses intended to transfer; and (2) to enhance General Education throughout Oregon by encouraging direct dialog among faculty in each of the disciplines within this rich curriculum. We recognized that these goals were ambitious, but we were optimistic because of the collegial attention that had already been given to General Education in Oregon. Creation of the Associate of Arts Oregon Transfer (AAOT) degree in the late 1980s was possible because of our shared vision of the key disciplinary elements of General Education and, in 2005, the same spirit generated the Oregon Transfer Module (OTM). Our common understanding of the importance and overall purpose of General Education was articulated by the OUS Provosts' Council and endorsed by the Community Colleges' Council of Instructional Administrators in Fall 2004.

The Purpose of General Education

The education of undergraduate students is an essential activity of all Oregon colleges and universities. While undergraduate education needs to provide discipline-specific knowledge and skills through concentrated work in an academic major, it must also help students develop the habits of mind that lead to thoughtful and productive global citizenship. All parts of a well-designed education encourage these habits, but an effective General Education curriculum has this as its explicit goal. To this end, it seeks to promote:

- *The capacity for analytical thinking and problem solving;*
- *The ability to communicate effectively, including listening, observing, speaking, and writing;*
- *An understanding of the natural world and the role of humans in it;*
- *An appreciation of the arts and humanities and the richness of human experience and expression;*
- *An awareness of multiple perspectives and the importance of diversity;*
- *A sense of societal responsibility, community service, and global citizenship; and*
- *The ability to develop a sense of direction, with the self-discipline needed for the ethical pursuit of a purposeful life.*

What was the problem?

Although colleges and universities in Oregon embrace the value of General Education, most have developed their own unique philosophies and curricula that support these ideals. These varied curricula are a valuable resource for Oregon students, but the underlying mechanics are complicated sets of course and credit specifications. Emphasis on these details can reduce this coursework to a mere check-list of requirements and fail to communicate the opportunities for delight and discovery it offers. Moreover, when students transfer, General Education credits may be "lost" because of incompatibilities among variant curricula – leading to understandable frustration in the face of seemingly arbitrary decisions.

What did we do about it?

As educators, we knew we had the responsibility for improving matters. While General Education curricula depend on course and credit requirements to shape the intellectual experiences we desire for students, we know that a variety of structures can promote the qualities we're after. Thinking through the genetic underpinnings of cancer promotes analytical thinking, but so does dissecting the religious and cultural influences in 7th century Spain.

The Joint Boards Articulation Commission (JBAC) believed that what was needed was a collaboratively-developed framework within which to consider specific General Education courses. The framework would consist of two elements: (1) the broad outcomes we desire for students who take these courses and (2) the criteria for courses likely to achieve those outcomes. In addition to smoothing transfer, such a model had the potential to strengthen General Education in fundamental ways. By adhering to general principles rather than a rigid template, faculty would have the freedom to design General Education courses that exploit individual expertise and new insights. Students would benefit from faculty innovation in the classroom, while retaining assurance of the transferability of their coursework. Beginning in February 2006, JBAC led the effort to create this framework through the steps outlined below.

What results do we anticipate?

Short-term: A clear statement of the intended learning outcomes of a General Education curriculum, regardless of its particular design, will help all of us communicate the key role of General Education – to students, parents, and Oregon citizens. The definition of criteria for effective General Education courses will be immediately helpful to faculty as they improve existing General Education courses and design new ones.

Long-term: We hope that the criteria for effective General Education courses will form the basis of a new, faculty-led procedure for making thoughtful decisions about General Education coursework. At present, equivalency decisions can appear arbitrary because they are made according to local campus guidelines that are not widely known. In the new system, transferability will not depend on identity of course numbering or content, but on more general characteristics that can be shared by courses on diverse topics. Perhaps most important, we hope that the new system will foster a culture of substantive curricular discussions among faculty from diverse institutions. The collegiality of such groups was demonstrated during the creation of these Outcomes and Criteria statements and we think their combination of disciplinary expertise and direct classroom experience is powerful. They are in the best position to communicate the nature of college-level work in their areas and to stimulate interest in high quality General Education for students throughout Oregon.

Arts & Letters

Outcomes

As a result of taking General Education Arts & Letters* courses, a student should be able to:

- Interpret and engage in the Arts & Letters, making use of the creative process to enrich the quality of life; **and**
- Critically analyze values and ethics within a range of human experience and expression to engage more fully in local and global issues.

* "Arts & Letters" refers to works of art, whether written, crafted, designed, or performed and documents of historical or cultural significance.

Criteria

A course in Arts & Letters should:

1. Introduce the fundamental ideas and practices of the discipline and allow students to apply them.
2. Elicit analytical and critical responses to historical and/or cultural works, such as literature, music, language, philosophy, religion, and the visual and performing arts.
3. Explore the conventions and techniques of significant forms of human expression.
4. Place the discipline in a historical and cultural context and demonstrate its relationship with other discipline.
5. Each course should also do at least one of the following:
    - Foster creative individual expression *via* analysis, synthesis, and critical evaluation;
    - Compare/contrast attitudes and values of specific historical periods or world cultures; and
    - Examine the origins and influences of ethical or aesthetic traditions.

Cultural Literacy

Cultural Literacy outcomes will be included in courses that meet the outcomes and criteria of a Discipline Studies requirement.

Outcomes

As a result of taking a designated Cultural Literacy course, learners would be able to:

- Identify and analyze complex practices, values, and beliefs and the culturally and historically defined meanings of difference.

Criteria

A course with the Cultural Literacy designation will:

1. Explore how culturally-based assumptions influence perceptions, behaviors, and policies.

2. Examine the historical bases and evolution of diverse cultural ideas, behaviors, and issues.

Each course *may* also do one or more of the following:

- Critically examine the impact of cultural filters on social interaction so as to encourage sensitivity and empathy toward people with different values or beliefs.
- Investigate how discrimination arises from culturally defined meanings attributed to difference.
- Analyze how social institutions perpetuate systems of privilege and discrimination.
- Explore social constructs in terms of power relationships.

Mathematics

Outcomes

As a result of taking General Education Mathematics courses, a student should be able to:

- Use appropriate mathematics to solve problems; **and**
- Recognize which mathematical concepts are applicable to a scenario, apply appropriate mathematics and technology in its analysis, and then accurately interpret, validate, and communicate the results.

Criteria

A collegiate level Mathematics course should require students to:

1. Use the tools of arithmetic and algebra to work with more complex mathematical concepts.
2. Design and follow a multi-step mathematical process through to a logical conclusion and judge the reasonableness of the results.
3. Create mathematical models, analyze these models, and, when appropriate, find and interpret solutions.
4. Compare a variety of mathematical tools, including technology, to determine an effective method of analysis.
5. Analyze and communicate both problems and solutions in ways that are useful to themselves and to others.
6. Use mathematical terminology, notation and symbolic processes appropriately and correctly.
7. Make mathematical connections to, and solve problems from, other disciplines.

Science or Computer Science

Outcomes

As a result of taking General Education Science or Computer Science courses, a student should be able to:

- Gather, comprehend, and communicate scientific and technical information in order to explore ideas, models, and solutions and generate further questions;

- Apply scientific and technical modes of inquiry, individually, and collaboratively, to critically evaluate existing or alternative explanations, solve problems, and make evidence-based decisions in an ethical manner; **and**
- Assess the strengths and weaknesses of scientific studies and critically examine the influence of scientific and technical knowledge on human society and the environment**.**

Criteria

A General Education course in either Science or Computer Science should:

1. Analyze the development, scope, and limitations of fundamental scientific concepts, models, theories, and methods.
2. Engage students in problem-solving and investigation, through the application of scientific and mathematical methods and concepts, and by using evidence to create and test models and draw conclusions. The goal should be to develop analytical thinking that includes evaluation, synthesis, and creative insight.
3. Examine relationships with other subject areas, including the ethical application of science in human society and the relevance of science to everyday life.

In addition,

A General Education course in Science should:

- Engage students in collaborative, hands-on and/or real-life activities that develop scientific reasoning and the capacity to apply mathematics and that allow students to experience the exhilaration of discovery; and

A General Education course in Computer Science should:

- Engage students in the design of algorithms and computer programs that solve problems.

Social Science

Outcomes

As a result of taking General Education Social Science courses, a student should be able to:

- Apply analytical skills to social phenomena in order to understand human behavior; **and**
- Apply knowledge and experience to foster personal growth and better appreciate the diverse social world in which we live.

Criteria

An introductory course in the Social Sciences should be broad in scope. Courses may focus on specialized or interdisciplinary subjects, but there must be substantial course content locating the subject in the broader context of the discipline(s). Approved courses will help students to:

1. Understand the role of individuals and institutions within the context of society.
2. Assess different theories and concepts and understand the distinctions between empirical and other methods of inquiry.

3. Utilize appropriate information literacy skills in written and oral communication.
4. Understand the diversity of human experience and thought, individually and collectively.
5. Apply knowledge and skills to contemporary problems and issues.

Speech/Oral Communication

Outcomes

As a result of taking General Education Speech/Oral Communication courses, a student should be able to:

- Engage in ethical communication processes that accomplish goals;
- Respond to the needs of diverse audiences and contexts; **and**
- Build and manage relationships.

Criteria

A course in Speech/Oral Communication should provide:

1. Instruction in fundamental communication theories.
2. Instruction and practice of appropriate oral communication techniques.
3. Instruction and practice in the listening process.
4. Instruction and practice in comprehension, interpretation, and critical evaluation of communication.
5. Instruction and practice in adapting verbal and non-verbal messages for the listener and communication contexts.
6. Instruction in the responsibilities of ethical communicators.
7. Instruction in the value and consequences of effective communication.

Writing

Outcomes

As a result of completing the General Education Writing sequence, a student should be able to:

- Read actively, think critically, and write purposefully and capably for academic and, in some cases, professional audiences;
- Locate, evaluate, and ethically utilize information to communicate effectively; **and**
- Demonstrate appropriate reasoning in response to complex issues.

Criteria

A course in Writing should:

1. Create a learning environment that fosters respectful and free exchange of ideas.

2. Include college-level readings that challenge students and require the analysis of complex ideas.
3. Provide guided discussion and model practices that help students listen to, reflect upon, and respond to others' ideas.
4. Foster students' ability to summarize and respond in writing to ideas generated by reading and discussion.
5. Require a substantial amount of formal and informal writing.
6. Emphasize writing as a recursive process of productive revision that results in complete, polished texts appropriate to audience needs and rhetorical situations.
7. Foreground the importance of focus, organization, and logical development of written work.
8. Guide students to reflect on their own writing, to provide feedback on peers' drafts, and to respond to peer and instructor comments.
9. Direct students to craft clear sentences and to recognize and apply the conventions of Edited Standard Written English.
10. Provide students with practice summarizing, paraphrasing, analyzing, synthesizing, and citing sources using a conventional documentation system.
11. Require appropriate technologies in the service of writing and learning.

Information Literacy

Information Literacy outcomes and criteria will be embedded in the Writing Foundational Requirements courses.

Outcomes

As a result of taking General Education Writing courses infused with Information Literacy, a student who successfully completes should be able to:

- Formulate a problem statement;
- Determine the nature and extent of the information needed to address the problem;
- Access relevant information effectively and efficiently;
- Evaluate information and its source critically; **and**
- Understand many of the economic, legal, and social issues surrounding the use of information.

Criteria

A Writing course infused with Information Literacy should include:

1. Instruction and practice in identifying gaps in knowledge and recognizing when information is needed.
2. Instruction and practice in finding information efficiently and effectively, using appropriate research tools and search strategies.
3. Instruction and practice in evaluating and selecting information using appropriate criteria.
4. Instruction and practice in research strategies that are recursive and involve multiple stages such as modification of the original strategy and revision of the topic.
5. Instruction and practice in the ethical and legal use of information and information technologies.
6. Instruction and practice in creating, producing, and communicating understanding of a subject through synthesis of relevant information.

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APPENDIX C.

ENGLISH LITERATURE MTM

This Major Transfer Map outlines specific course requirements for students at any Oregon community college who plan to transfer to a four-year public university and earn a Bachelor's of Arts in English literature. Students may take classes that fit these categories at any Oregon community college and expect all classes to transfer into general education or the major at any Oregon public university. This map is intended for students who know they want to transfer and earn a Bachelor's of Arts in English literature, but who are unsure of their intended transfer destination. Students should work with an advisor to ensure they fulfill the requirements of this major transfer map. Students who are certain of both their major and their intended transfer destination should consult an advisor for information on an existing specific articulation agreement or degree map that will prescribe their course requirements. If a student is seeking a Bachelor's of Science in English literature, they should work with an advisor.

Note that in order for a student to successfully transfer to an Oregon public university, students must: 1) earn a grade of a "C" or better in courses in the major; 2) take courses in the major for a grade—they will not be accepted as "pass/no pass"; and 3) earn a cumulative grade point average of 2.0. Students must also regularly meet with an advisor. Students are strongly encouraged to: 1) seek advising before their first term of college; 2) seek advising after they have completed the 27-35 credits of the Core Transfer Map; and 3) seek advising and meet with a transfer coordinator before registration opens at the beginning of the students second year in college. Students should also be aware that if they want to complete this Major Transfer Map in two years, they should take an average of 45 credits per year, or approximately 15 credits per quarter. Finally, to earn at Associates of degree, students will need to successfully complete at least 90 credits.

CORE TRANSFER MAP ***See an advisor for recommended courses before your first term***		
Writing		
1 course	WR121	3-4
Arts & Letters		
1st course	200-level literature from AAOT course list* **If students take American or British survey courses they will count toward major requirements at WOU* ***At EOU, SOU, UO & PSU this course also counts toward major requirements (at PSU up to 12 credits of 200-level Eng. literature can count toward the major)* ****At OSU this course only counts toward the major and students will need to take another Arts and Letters course*	3-4
2nd course	200-level literature from AAOT course list* **If students take American or British survey courses they will count toward major requirements at WOU* ***At EOU and SOU this course also counts toward major requirements, at PSU up to 12 credits of 200-level Eng. lit can count toward the major* ****At OSU this course only counts toward the major and student will need to take another Arts and Letters course*	3-4
Social Sciences		
1st course	Select from AAOT course list	3-4
2nd course	Select from AAOT course list	3-4
Natural Sciences		
1st course	Lab Science from AAOT course list	4-5
2nd course	Lab Science from AAOT course list *****at PSU counts toward UNST placement (see footnote on last page)*	4-5
Mathematics		
1 course	MTH 105 or Higher *****not required at PSU counts toward UNST placement (see footnote on last page)*	4-5

At least 1 Core Transfer Map course must also satisfy Cultural Literacy outcomes for AAOT		
Core Transfer Map Total		***27-35***
ADDITIONAL GENERAL EDUCATION COURSES ***See an advisor for recommended courses***		
Writing	WR 122	3-4
ENGLISH LITERATURE COURSES ***See an advisor for recommended courses***		
Literature A	Eng 2xx Shakespeare	3-4
Literature B	Eng 2xx (course from American or British Survey)	3-4
English Literature Total		***6-8***
BACHELOR'S DEGREE REQUIREMENTS ***See an advisor for recommended courses***		
2nd Language	Through 203 or end of 2nd year or higher, C- or better in last course**** *Note: At EOU, PSU, UO & WOU this fulfills both a degree requirement and some general education* ******Students without any second language credits should begin the 100-level sequence in their first year at a community college. Students should complete language requirements before transferring. Students transferring to EOU should be aware that they only offer Spanish. Students may also be able to demonstrate proficiency through an exam or other means.*	4-24
MTM Total		***40-71***
ADDITIONAL COURSES TO REACH 90 CREDITS ***See an advisor for recommended courses***		
At this point [above = 40-71 credits], it is recommended students pursue these options:		
1. Take courses that will apply to their minor of choice, that will transfer to the Oregon public university of their choice (work with an advisor)		
2. Take courses that will apply to the general education or the major at the Oregon public university of their choice (work with an advisor)		
3. Take electives to reach 90 credits, that will transfer to the Oregon public university of their choice (work with an advisor)		
EXAMPLES OF ADDITIONAL GENERAL EDUCATION THAT WON'T RESULT IN EXCESS CREDIT (UNLESS NOTED) & TRANSFERS TO OREGON PUBLIC UNIVERSITIES ***See an advisor for recommended courses***		
Oral Communication	COMM 111 or equivalent[1] *[1]transfers to all Oregon public universities and fulfills general education, or at PSU counts toward UNST placement (see footnote below)*	3-4
Arts and Letters	Philosophy[2] *[2]this course counts as "Aesthetics and Humanities" (AEH) at EOU, which is fulfilled by other courses in the MTM, so this course would be unnecessary (excess) general education credit at EOU and would count as an elective* ***** At PSU counts toward UNST placement (see footnote below)*	3-4
Arts and Letters	Music or Theater Appreciation courses[3] *[3]this course is not necessary for general education at EOU and would count as an elective unless it is a music or theater performance class*	3-4

	** 4-credits chosen from one of the following areas will satisfy the PSU 4- cr. Fine & Performing Arts requirement: Architecture, Art History, Art, Dance, Film, Fine & Performing Arts (FPA), Music Education, Music, Applied Music, and Theater Arts*	
Social Science	United States History (citizenship, social responsibility, global awareness)[4] *[4]transfers to all Oregon public universities and fulfills general education, or at PSU counts toward UNST placement (see footnote below)*	3-4
Science	Biological or Physical Science[5] *[5]students must take a different science course than the one they took for the Core Transfer Map portion, this transfers to all Oregon public universities but the Science requirements are already filled for EOU and WOU so this could count as an elective and is unnecessary (excess) credit* ***** At PSU the Science requirements are also already satisfied, but these credits count toward UNST placement (see footnote below)*	4-5

******University Studies (UNST) is the name of PSU's 4-year General Education Program which includes a 15-credit Freshman Inquiry (FRINQ) requirement and a 12-credit Sophomore Inquiry (SINQ) requirement:** Students transferring with 30 or more credits will satisfy the FRINQ requirement; students transferring with 30-59 transfer credits are required to complete 3 SINQ courses; with 60-74 credits are required to complete 2 SINQ courses; with 75-89 are required to complete 1 SINQ course. Students transferring with 90 or more credits will begin with a 12-credit Junior-level Cluster and complete the 6-credit Capstone requirement

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HIGHER EDUCATION COORDINATING COMMISSION
December 12, 2019
Docket Item #: 11.4

Docket Item:

Credit for Prior Learning: 2019 Report to the Oregon Legislature (HB 4059, 2012)

Summary:

Passed in 2012, HB 4059 requires an annual report to the Oregon Legislature on the progress being made in meeting credit for prior learning goals outlined in the legislation. For the last seven years, HECC staff provided analysis for the annual report and worked with the Credit for Prior Learning (CPL) Advisory Committee to survey post-secondary institutions across the state on their credit for prior learning offerings and establish statewide standards for those offerings. The 2019 report provides an update on progress in the Commission's development of an expanded set of initiatives for adult learners that incorporates and leverages the work done for CPL within a broader adult attainment framework.

This annual report is due to Legislative Assembly no later than December 31 of each calendar year.

Docket Material:

Attachment: Report, 2019 Credit for Prior Learning HB 4059 (2012)

Staff Recommendation:

Staff recommends the Commission move to approve the Credit for Prior Learning: House Bill 4059 (2012), 2019 Report to the Oregon Legislature for submission to the Legislative Assembly.

HIGHER EDUCATION COORDINATING COMMISSION

CREDIT FOR PRIOR LEARNING: **HOUSE BILL 4059 (2012)**

2019 Report to the Oregon Legislature

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Cover photo courtesy of Mt. Hood Community College, 2018

PROGRESS AND ACCOMPLISHMENTS

House Bill 4059 (2012) aimed to reduce obstacles for Oregon residents in receiving academic credit for prior learning. The legislation intended that HECC take action to:

1) Increase the number and type of academic credits accepted for prior learning,
2) Increase the number of students that receive such credit.

Additionally, the legislation directed specific operational goals, including requirements that HECC:

3) Develop transparent policies and practices in awarding academic credit to be adopted by the governing boards,
4) Improve prior learning assessment practices across all institutions of higher education,
5) Create tools to develop faculty and staff knowledge and expertise in awarding such credit, and sharing exemplary policies across institutions,
6) Develop articulation agreements when patterns of academic credit pathways are evident, and finally,
7) Develop outcome measures to track progress on these goals.

The legislation required broad representation to lead this effort, and designated that members for the CPL Advisory Committee be appointed from the sectors listed below:

Public Universities	Labor
Community Colleges	For-profit Institutions
Independent Not-for-Profit Institutions	Business Community
Student of Two-Year or Four-Year Institution	

However, the legislation also authorized the Higher Education Coordinating Commission to appoint additional members based upon a demonstrated interest in and knowledge of prior learning programs.

Although funding was not associated with the bill, the Higher Education Coordinating Commission worked diligently with their Oregon postsecondary community counterparts toward these goals. Detailed reports of the committee's work is outlined in earlier reports to the Legislature, available on HECC's website.[1] Significant progress towards the goals of the legislation was made between 2013 and 2017, as reflected in these examples:

[1] https://www.oregon.gov/highered/research/Pages/reports.aspx

1) **CPL Pilot Project.** HECC staff initiated and facilitated the CPL Pilot Project (2014), which involved eleven institutions: community colleges (11), public universities (1), private, for-profit (1), and private, not-for-profit (1). This project involved HECC staff who worked with the schools for over two years to convene institutional cross-functional teams, develop an implementation plan and timeline, identify professional development/training needs and identify costs associated with implementing CPL Standards. This project helped build the foundational knowledge underpinning the Committee's work for the next five years.

2) **State standards for CPL**. Developed first version of state standards for credit for prior learning (2013), and through substantive statewide outreach efforts to higher education institutions, staff, faculty and students, the Higher Education Coordinating Commission subsequently revised and adopted the Oregon Credit for Prior Learning Standards[2] in 2017. The Standards are accompanied by a 'Frequently Asked Questions' document which addresses the predominant, reoccurring questions raised across several years and various events. These two documents were widely distributed to Oregon public and private universities, and community colleges as well as through Oregon institutional professional membership groups (e.g., Provosts Council, Oregon Community College Admissions and Registrars Directors, and Institutional Research) and posted for reference on HECC's website[3].

3) **Environmental scans**. The CPL Advisory Committee, staffed by HECC, conducted two environmental scans to collect data on credit for prior learning across Oregon's higher education landscape. The first scan focused on implementation practices across Oregon's institutions, which led to development of policy and procedures that enabled a more consistent process (i.e., the Learning Standards). The second scan (2017) sought to define how Oregon's post-secondary schools were responding to HB 4059, how they were implementing CPL and the challenges they perceived to be associated with offering CPL. The data from these efforts highlighted the complexity, confusion, challenges and barriers perceived by institutional members. However, this information allowed the Advisory Committee to better target its efforts to leverage change aligned with institutional capacity.

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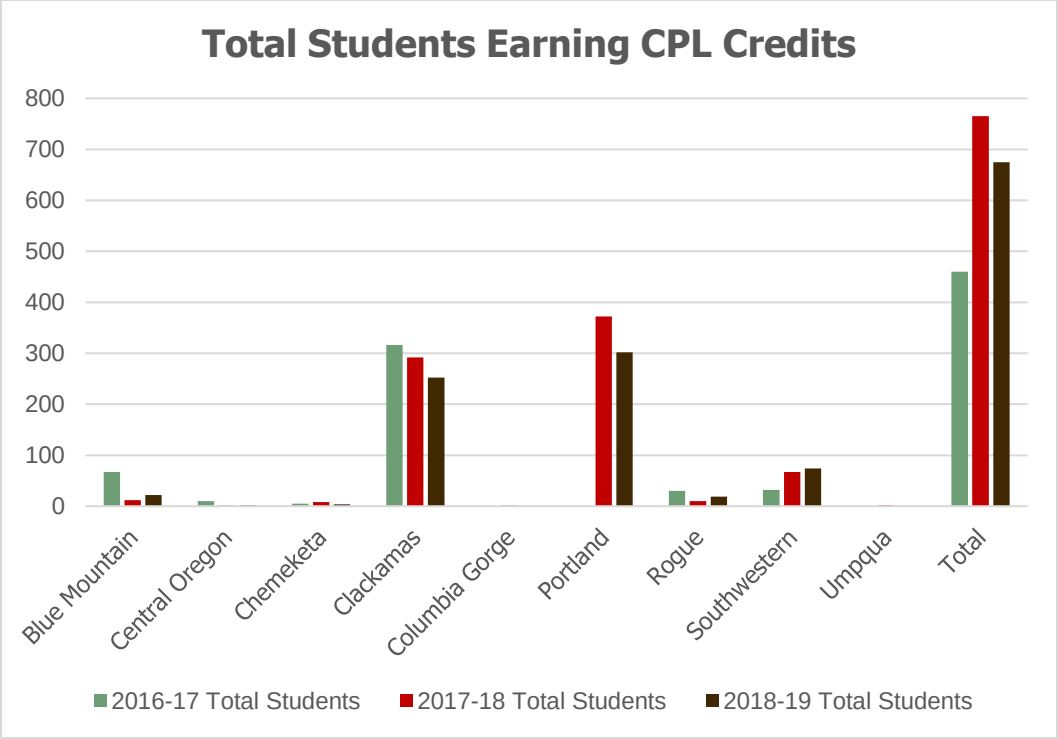
[2] https://www.oregon.gov/highered/policy-collaboration/Documents/Transfer-Credit/2017-CPL-Standards-2017-Final.pdf
[3] https://www.oregon.gov/highered/policy-collaboration/Pages/credit-prior-learning.aspx

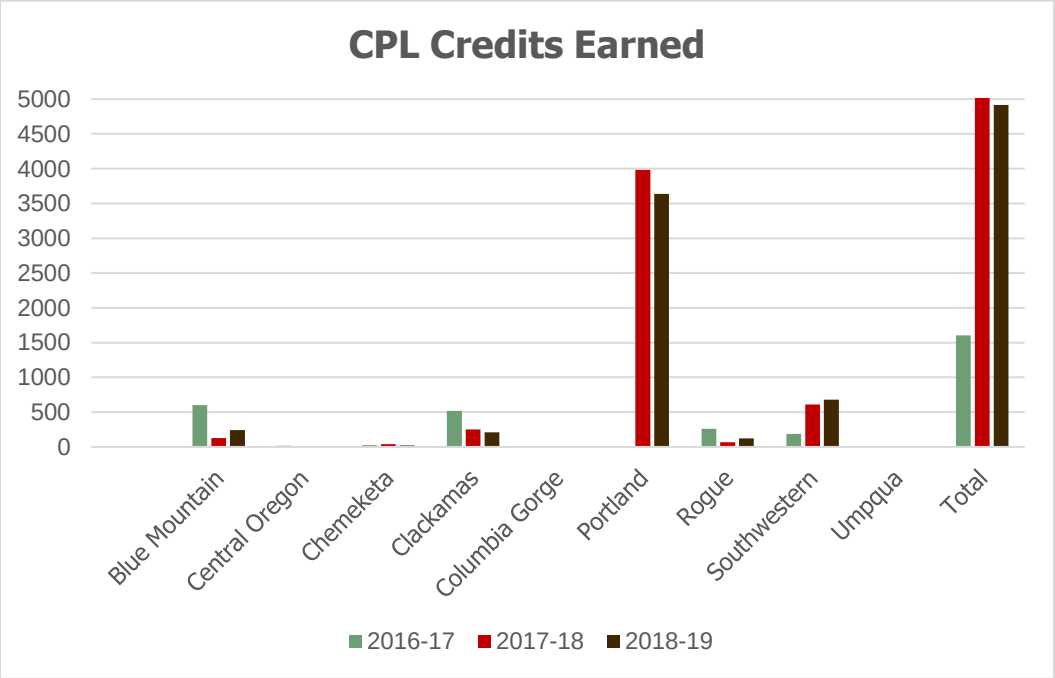
4) **Technical assistance**. Extensive outreach with faculty/staff from Oregon institutions through presentations at 2015 & 2016 Student Success Conference, CPL Assessment Event, ACE Transcription and Assessment event, and through the two-year Pilot Project, as well as to students via scheduled student panels.

5) **Improved understanding of CPL data collection**. The Community Colleges and Workforce Development agency (later subsumed into the HECC) had instituted requirements for tracking and submitting data on CPL in 2012. A wide-ranging set of stakeholders (including agency staff, college registrars, and college institutional researchers) then agreed upon standards and methods for meeting these requirements. Two events in 2016 helped advance CPL data reporting further. The first was a data summit in May 2016 that included a variety of presentation and interactive discussions between community college and HECC staff. Second was a meeting of Oregon Council of Community College Institutional Researchers, at which the CPL Advisory Committee co-chair, and HECC's CPL Administrator engaged in an interactive session that identified barriers and gaps in CPL reporting across the community colleges.

   However, most institutions continued to report challenges in adapting their course coding processes to incorporate CPL and submit data as planned and as required for HECC to standardize institutional CPL reporting. Institutions also report an ongoing need for funding to support data submission changes. Comments suggest the low number of students requesting CPL reviews in many institutions (for other than military or test-based challenge exams) seems to lower the priority for funding such efforts.

   Data submitted by the institutions are therefore limited, although there are insights from nine schools that did report. There is a range of both students and CPL credits awarded, generally following the size of the community college district's enrollment. In 2018-19, Portland Community College was responsible for the largest number of credits awarded (3,684) and the greatest number of participating students. However, the average benefit to students varied. For example, in those three years, Clackamas College had a range of 252 to 316 students who earned CPL credits; however, those students earned only an average of 1 credit each. In contrast, Portland Community College had more participating students (302-372), but those students earned a much higher average of nearly 12 credits. The two charts on the next page summarize the last three years' available data.


Total Students Earning CPL Credits
800
700
600
500
400
300
200
100
0
Blue Mountain
Central Oregon
Chemeketa
Clackamas
Columbia Gorge
Portland
Rogue
Southwestern
Umpqua
Total
2016-17 Total Students
2017-18 Total Students
2018-19 Total Students


CPL Credits Earned
5000
4500
4000
3500
3000
2500
2000
1500
1000
500
0
Blue Mountain
Central Oregon
Chemeketa
Clackamas
Columbia Gorge
Portland
Rogue
Southwestern
Umpqua
Total
2016-17
2017-18
2018-19

EMERGING AND MERGING PERSPECTIVES: 2017-2019

Across 2017 and 2018, there was a reconceptualization in state education goals, leading to a more holistic perspective on adults across multiple HECC initiatives. The impetus was the redefinition of the 40-40-20 goal for Oregon educational achievement.

In 2017, House Bill 2311 articulated that Oregon's 40-40-20 goal inherently applied to young adults who would be expected to realize the goal as they exit secondary or postsecondary education. It did not focus explicitly on older adults who may instead need some kind of credential to enter or advance in the workforce. Efforts began to articulate the details of a new adult attainment goal, through a designated Adult Attainment Workgroup.

Concurrently in 2017, the CPL Advisory Committee was coming to perceive that a broader scope of college completion and student success efforts was possible. Because the CPL initiative was well established at that point, the Committee planned less frequent meetings for late 2017 while HECC realigned the mission of the Committee with the state's needs. However, by early 2018, as the work wound down, the committee lacked enough attendees at meetings to move forward or to reach a necessary quorum for decisions.

By September 2018, the Adult Attainment Workgroup, completed their task to define a new educational goal for the adult population. Passage of the new goal occurred in November 2018, with the final adult attainment goal stated as follows:

> Oregon anticipates more than 120,000 additional jobs requiring post-secondary training or education between now and 2030. In order to meet this need, 300,000 additional adult Oregonians should earn a new degree, certificate or credential valued in the workforce during that time. Because Oregon has substantial attainment gaps among minority, low income and rural Oregonians, the state will also commit to reducing those attainment gaps by half during the decade.

The Adult Attainment Workgroup still had unfinished work, particularly in defining credentials of value and discerning how they might be tracked, but before its last meeting in September 2018, HECC staff were able to submit a grant proposal for an

Adult Promise grant from the Lumina Foundation for Education ("Lumina")[4]. In December 2018, HECC was awarded nearly $700,000 from Lumina to support agency efforts on closing attainment gaps by race/ethnicity, with a portion focused explicitly on adult attainment efforts. Given the focus of the grant, it was well-timed to advance HECC's ongoing efforts.

Thus, the new adult attainment goal, the promising work envisioned by the Adult Attainment Workgroup, and the award of the Lumina grant, began to coalesce to guide HECC efforts. In order to achieve the goals of the Workgroup, and inform the work of the Lumina grant, the Adult Learner Advisory Committee (ALAC) was created. As the Committee's Charter began to emerge in discussions, it began to suggest promising synergy with the Credit for Prior Learning efforts. Transitioning efforts to increase the awarding of CPL into a key strategy of the broader ALAC was discussed in a meeting with a small group of CPL Advisory Committee members in summer 2018, resulting in general endorsement for such a change.

The final ALAC Charter was finalized in the summer of 2019, and provided the framework or the committee's purpose, membership, role and expected outcomes. Several key details from ALAC's charter help to inform this report's topic, and specifically, suggest that efforts previously managed under the CPL Advisory Committee may be productively addressed under the oversight of the ALAC.

The Adult Learner Advisory Committee shall:

1. Develop strategies and disseminate best practices regarding how adults gain skills outside the traditional P-20 education pipeline,
2. Serve as an advisory group to connect and align multiple adult attainment efforts within the HECC,
3. Investigate and provide recommendations regarding the evolving definition of "credential of value", and
4. Evaluate the impact that Credit for Prior Learning Standards may offer to benefit adult students, and
5. Evaluate progress toward achievement of the Adult Attainment Goal.

[4] The Lumina Foundation has established the Strategy Labs Talent, Innovation and Equity Partnership program ("TIE Partnership").

Overall these suggest that HECC's efforts on Credit for Prior Learning may be better framed as one tool in a toolkit of multiple strategies that can maximize adults' efforts to reach their educational goals. This warrants consideration particularly at this juncture, with the achievement of the CPL Standards, well-implemented by the former CPL Advisory Committee.

One of the summary statements from the 2018 Credit for Prior Learning Report to the Legislature suggested, "HECC will examine an expanded set of initiatives for adult learners that incorporates and leverages the work done for CPL in an effort to combine CPL with future adult attainment initiatives". Over the course of late 2018 and 2019, this consideration has occurred deliberately as well as organically. HECC staff evaluated the wholesale integration of the CPL Advisory Committee into the ALAC, but opted instead to create a membership for ALAC that overlaps that of the former CPL Advisory Committee with some additional breadth from industry, workforce development, and additional offices of the HECC. As ALAC makes progress on its work, staff will continue to develop a plan for integrating the work of the CPL Advisory Committee into a broader agenda to support reaching Oregon's adult attainment goal.

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December 12, 2019
Docket Item #: 12.1

Docket Item:

Approve Permanent Rule Chapter 575: Oregon Promise Grant Program

Summary:

HB 2910, passed in 2019, expands eligibility criteria for the Oregon Promise Grant for certain individuals. Under the new law, students who complete their high school diploma or GED® test credential while in an Oregon correctional facility, may be eligible for Oregon Promise if they attend an Oregon community college within 6 months of their first release date from the correctional facility. Rule changes are necessary in order to clearly explain the adjusted eligibility criteria for these students. The Higher Education Coordinating Commission has worked closely with staff from Oregon Department of Corrections, Oregon Youth Authority, and Oregon Health Authority to clarify eligibility criteria and implementation considerations for HB 2910.

Materials:

Rule Text.

Staff Recommendation:

Staff recommends the Commission move to approve the proposed permanent rule.

HECC - Office of Student Access and Completion

Chapter 575**,** Division 39

OREGON PROMISE GRANT PROGRAM

575-039-0010

Definitions

(~~7~~1) "Concurrently Enrolled." A student who attends more than one eligible institution under a written consortium agreement or concurrent enrollment program. The student's "home" institution determines the student's eligibility for federal and state financial aid, disburses funds to the student, and is responsible for reporting enrollment and disbursement information to the Commission.

(2) “Correctional facility.” Any place used for the confinement of young persons, youth or youth offenders or persons charged with or convicted of a crime or otherwise confined under a court order, including a:

(a) Youth correction facility;

(b) Detention facility;

(c) Department of Corrections institution;

(d) Local correctional facility; or

(e) State hospital or a secure intensive community inpatient facility, with respect to persons detained therein who are youth or youth offenders, who are charged with or convicted of a crime or who are detained therein after having been found guilty except for insanity of a crime under ORS 161.290 to 161.370 or having been found responsible except for insanity under ORS 419C.411.

(3) “Date of First Release.” Date when the person is released from a correctional facility, immediately following the period of custody or incarceration when the person completes the highest level of education as described in 575-039-0020, subsection (2), as determined by the agency responsible for the release from custody or incarceration.

(~~9~~4) “Department of Corrections institution.” Defined by ORS 421.005.

(~~2~~5) "Dependent/Independent Student." The definition of dependent/independent student shall be the definition used for the student aid programs under Title IV of the Higher Education Act of 1965 as amended.

(6) “Detention facility,” “young person,” “youth” and “youth offender.” Defined by ORS 419A.004.

(7) “Fees.” Fees are the standard fees charged to all students.

(8) "Full-Time Enrollment." Registration and payment of required fees as a full-time student, at an eligible institution or combination of eligible institutions, based on a minimum of 12 credit-hours per academic term. Students attending more than one eligible institution must meet the definition of concurrently enrolled as defined in OAR 575-031-0005(7) to be considered enrolled full time.

(9) "Half-Time Enrollment." Registration and payment of required fees as a half-time student, at an eligible institution or combination of eligible institutions, based on 6 to 11 credit-hours per academic term.

(10) “Local correctional facility.” Defined by ORS 169.005.

(11) "Resident of Oregon." For purposes of the Oregon Promise Grant, residency is established by virtue of the student (in the case of independent students) or the student's parent (in the case of dependent students) having been in continuous residency in this state for the 12 months preceding enrollment in an eligible program at a community college in Oregon.

(a) A dependent resident student whose Oregon domiciled parent(s) move out-of-state shall retain resident classification as long as the student is continuously enrolled at an Oregon high school or Oregon postsecondary institution. Continuous enrollment is defined as completion of an academic year within any 12-month period;

(b) An independent resident student shall retain resident classification as long as the student is continuously enrolled at an Oregon postsecondary institution. Continuous enrollment is defined as completion of an academic year within any 12-month period;

(c) A dependent student whose parent(s) are serving on active duty in the U. S. Armed Forces outside the State of Oregon shall have residency status determined by the parents' declared "home of record".

(d) A student from a state other than Oregon, or from the Federated States of Micronesia, who is receiving or is eligible to receive financial assistance through the government of that state or the Federated States, shall not be considered a resident of Oregon;

(e) Eligibility for certain scholarships administered by the Commission does not necessarily qualify a student as an Oregon resident for the purposes of the Oregon Promise grant.

(f) Students who are enrolled members of federally recognized tribes of Oregon or who are enrolled members of a federally recognized Native American tribe which had traditional and customary tribal boundaries that included parts of the state of Oregon or which had ceded or reserved lands within the state of Oregon may be deemed eligible for this program, regardless of state of residence, if they meet all other eligibility criteria. For this purpose, federally recognized tribes are those listed in OAR 575-030-0005.

~~(2) "Dependent/Independent Student." The definition of dependent/independent student shall be the definition used for the student aid programs under Title IV of the Higher Education Act of 1965 as amended.~~

(~~3~~12) “Tuition.” Tuition is the amount charged to a student for a course and is based upon the number of credit hours for which the course is offered.

~~(4) “Fees.” Fees are the standard fees charged to all students.~~

~~(5) "Full-Time Enrollment." Registration and payment of required fees as a full-time student, at an eligible institution or combination of eligible institutions, based on a minimum of 12 credit-hours per academic term. Students attending more than one eligible institution must meet the definition of concurrently enrolled as defined in OAR 575-031-0005(7) to be considered enrolled full time.~~

~~(6) "Half-Time Enrollment." Registration and payment of required fees as a half-time student, at an eligible institution or combination of eligible institutions, based on 6 to 11 credit-hours per academic term.~~

~~(7) "Concurrently Enrolled." A student who attends more than one eligible institution under a written consortium agreement or concurrent enrollment program. The student's "home" institution determines the student's eligibility for federal and state financial aid, disburses funds to the student, and is responsible for reporting enrollment and disbursement information to the Commission.~~

~~(8) "Correctional facility." Any place used for the confinement of young persons, youth or youth offenders or persons charged with or convicted of a crime or otherwise confined under a court order, including a:~~

~~(a) Youth correction facility;~~

~~(b) Detention facility;~~

~~(c) Department of Corrections institution;~~

~~(d) Local correctional facility; or~~

~~(e) State hospital or a secure intensive community inmpatient facility, with respect to persons detained therein who are youth or youth offenders, who are charged with or convicted of a crime or who are detained therein after having been found guilty except for insanity of a crime under ORS 161.290 to 161.370 or having been found responsible except for insanity under ORS 419C.411.~~

~~(9) "Department of Corrections institution." Defined by ORS 421.005.~~

~~(10) "Detention facility," "young person," "youth" and "youth offender." Defined by ORS 419A.004.~~

~~(11) "Local correctional facility." Defined by ORS 169.005.~~

(1~~2~~3) "Youth correction facility." Defined by ORS 420.005.

~~Date of First Release."~~

Statutory/Other Authority: ORS 341.522

Statutes/Other Implemented: ORS 341.522

History:

OSAC 2-2016, f. & cert. ef. 4-21-16

575-039-0020

Student Eligibility for Oregon Promise Grant

To be eligible for an Oregon Promise Grant a student must:

(1) Be an Oregon resident for at least 12 months prior to enrolling in an Oregon community college;

(2~~a~~) Have attained the highest level of education in this state prior to receiving ~~a~~a high school diploma under ORS 329.451, or earned a General Educational Development (GED) certificate at an Oregon testing center under ORS 351.768, or completed grade 12 while home schooled in Oregon under ORS 339.035;

(3~~b~~)(a) Have earned a cumulative high school grade point average of 2.5 or its equivalent or better;

(b) The Commission will determine if a student who does not earn a cumulative grade point average of 2.5 or better in high school may otherwise demonstrate an equivalent academic ability.

(4~~c~~) Meet one of the following two criteria:

(a) Within 6 months of high school (or equivalent GED or homeschool) completion date, enroll in approved courses at an Oregon community college; or

(b) If the student completes high school (or equivalent GED or homeschool) on or after January 1, 2020 while they are in custody or incarceration at a correctional facility, they must enroll in approved courses at an Oregon community college within 6 months of the date of first release from a correctional facility.

(5~~d~~) Have completed a Free Application for Federal Student Aid (FAFSA), if eligible to file the application, and accepted all state and federal grant aid offered; and

(6~~e~~) Have not completed more than 90 credit hours, or the equivalent, at a post-secondary institution of education or a curriculum, degree or program.

~~(2) The Commission will determine if a student who does not earn a cumulative grade point average of 2.5 or better in high school may otherwise demonstrate an equivalent academic ability.~~

Statutory/Other Authority: ORS 183 & 341.522

Statutes/Other Implemented: ORS 341.522

History:

OSAC 2-2016, f. & cert. ef. 4-21-16

575-039-0030

Institutional Eligibility

Eligible institutions are any Oregon community college operated under ORS chapter 341.

Statutory/Other Authority: ORS 341.522

Statutes/Other Implemented: ORS 341.522

History:

OSAC 2-2016, f. & cert. ef. 4-21-16

575-039-0040

Eligible Courses and Programs

(1) Oregon Promise Grants may be awarded to students who are enrolled in courses at an Oregon community college that are required for completion of:

(a) An associate degree; or

(b) A program in career and technical education.

(2) Eligible courses include those developmental education courses that are required for an eligible certificate or degree program or that are prerequisites to required courses in an eligible program.

(3) To receive an Oregon Promise Grant, a student must be enrolled in an eligible program as identified by the Commission and determined by the institution the student attends.

Statutory/Other Authority: ORS 341.522

Statutes/Other Implemented: ORS 341.522

History:

OSAC 2-2016, f. & cert. ef. 4-21-16

575-039-0050

Enrollment

A student must be enrolled or accepted for enrollment as at least a half-time undergraduate student at an eligible institution to receive Oregon Promise grant funds.

Statutory/Other Authority: ORS 341.522

Statutes/Other Implemented: ORS 341.522

History:

OSAC 2-2016, f. & cert. ef. 4-21-16

575-039-0060

Oregon Promise Grant Amount

(1) The total amount of an Oregon Promise Grant award will be based on the number of credit hours in approved courses that the student attempts each term. For each academic term, the student's grant award will be reduced by a copayment of $50 and any amounts received in state and federal grants.

(2) The maximum grant award available to an eligible a student for a full academic year will be an amount that equals:

(a) No less than $1,000 or the actual cost of tuition, whichever is less; and

(b) No more than the average cost of tuition at a community college in this state, as determined by the office, or the actual cost of tuition, whichever is less.

(3) Grant award amounts will be prorated for a student who is enrolled in approved courses for a sufficient number of credit hours to be considered enrolled at least a half-time but less than full time.

(~~3~~4) Cost calculations each academic term shall include only the amount of tuition charged to the student for credits attempted. Fees will not be included.

Statutory/Other Authority: ORS 341.522

Statutes/Other Implemented: ORS 341.522

History:

OSAC 2-2016, f. & cert. ef. 4-21-16

575-039-0070

Conditions of Award

(1) In order to remain eligible for an Oregon Promise award, continuing students must:

(a) Maintain a cumulative grade point average of 2.5 or better each term for which the student receives the grant.

(b) Make satisfactory academic progress in an approved program, as defined by the institution in accordance with federal Title IV regulations and guidelines.

(c) Enroll for a sufficient number of credits to be considered at least a half-time student.

(2) A student continues to remain eligible to receive an Oregon Promise Grant until the student has completed more than 90 credit hours attempted at an eligible Oregon community college, or the equivalent at a postsecondary institution of education, including those postsecondary credit hours attempted while the student is enrolled in high school.

(3) The Commission may deny renewal of an award to any student failing to make satisfactory academic progress as defined by the institution.

(4) No Oregon Promise Grant shall be made to any student enrolled in a course of study required for and leading to a degree in theology, divinity, or religious education.

(5) An Oregon Promise Grant recipient shall sign a statement of Selective Service Registration Compliance in conformity with the requirements of Title IV student aid programs, if applicable.

(6) An Oregon Promise Grant recipient must be enrolled in an eligible program as defined by the Commission.

(7) A student who fails to maintain a cumulative grade point average of 2.5 or better during each term for which the student has received a grant may request that the requirement be waived by the office according to rules adopted by the Commission.

Statutory/Other Authority: ORS 341.522

Statutes/Other Implemented: ORS 341.522

History:

OSAC 2-2016, f. & cert. ef. 4-21-16

575-039-0080

Prioritization of Grant Recipients

(1) The Commission may prescribe the priority by which grants are awarded, which allows for preference to be given to persons enrolled in school districts or high schools that meet specified criteria as determined by the Commission.

(2) Prior to the start of the fall term of each academic year, the Commission shall determine whether there are sufficient moneys to award a grant to each person who meets the eligibility criteria described in OAR 575-039-0020. On the basis of this determination, the Commission may limit eligibility to receive a grant to a person whose family contribution, is at or below the level the Commission determines is necessary to allow the Commission to operate the Oregon Promise program with available moneys. In setting a limitation on eligibility and setting eligibility limits, the Commission shall consider:

(a) The amount of funds allocated to the Oregon Promise program for the biennium;

(b) The estimated costs of awarding eligible students in prior-year cohorts who have not yet exceeded the program's 90-credit limit;

(c) The estimated costs of awarding new eligible applicants during both years of the biennium each academic year, assuming a liability of up to 90 credits, which may extend beyond two years;

(d) The anticipated tuition changes at the Oregon Community Colleges; and

(e) The sustainability of the program to accommodate current and future cohorts within the biennium.

(3) The Commission may reduce or eliminate any limitation on eligibility previously imposed by the Commission under (2) of this subsection.

(4) For purposes of this section, "family contribution" is the same as a student's Expected Family Contribution.

Statutory/Other Authority: ORS 341.522

Statutes/Other Implemented: ORS 341.522

History:

OSAC 1-2018, amend filed 02/09/2018, effective 02/09/2018

OSAC 1-2017(Temp), f. & cert. ef. 8-11-17 thru 2-6-18

OSAC 2-2016, f. & cert. ef. 4-21-16

575-039-0090

Disbursement of Grant Funds to Students

(1) Institutions shall disburse grants to students identified by the Commission from funds provided by the Commission each academic term.

(2) Institutions shall not disburse grants to students who cease to meet conditions of award identified by the Commission.

(3) If, as a result of an institutional error, grants are disbursed to ineligible students, to students in ineligible programs, or to students for an inappropriate number of terms, the institution shall reimburse the State of Oregon the full amount of monies erroneously disbursed.

(4) Institutions shall disburse grants to eligible students within a time schedule established annually by the Commission.

(5) Institutions shall submit regular reports to the Commission regarding disbursements made to eligible students on a schedule determined by the Commission.

(6) Institutions shall refund unused grant funds to the Commission within a time schedule established annually by the Commission.

(7) A person who fails to maintain the cumulative grade point average of 2.5 becomes ineligible to receive a grant for the term after which the person fails to maintain the cumulative grade point average, unless the eligibility requirement is waived by the Office of Student Access and Completion according to rules established by the Commission. The institution the student attends will determine the student's eligibility for a waiver and will submit a waiver request to the Office for consideration and approval according to a process established by the Office. 8) Generally, a disbursement may not be made to a student who is no longer eligible. An otherwise eligible student becomes ineligible for an Oregon Promise Grant on the date that the student is no longer enrolled at the institution for the award year. With Commission approval, institutions may make late disbursements of retroactive awards for prior academic terms up to 60 days after the close of the year-end account reconciliation process or up to 60 days after the end if the student's period of enrollment, whichever is earlier.

Statutory/Other Authority: ORS 341.522

Statutes/Other Implemented: ORS 341.522

History:

OSAC 2-2016, f. & cert. ef. 4-21-16

575-039-0110

Record Keeping

(1) Each institution shall maintain sufficient records to document its activities relating to the program.

(2) Each institution shall make its academic and financial records available to the Commission at reasonable times for the purpose of assuring that the institution is complying with the rules relating to the administration of the program.

(3) Institutions shall retain the academic and financial records relevant to a disbursement of state grant funds for not less than three years following the end of the fiscal year in which that disbursement occurs.

Statutory/Other Authority: ORS 341.522

Statutes/Other Implemented: ORS 341.522

History:

OSAC 2-2016, f. & cert. ef. 4-21-16

575-039-0120

Rights of Appeal

(1) An institution shall have the right to appeal to the Commission in the instance of a disagreement with a policy or procedure of the Commission or its staff. In such case, the decision of the Commission is final unless a court of competent jurisdiction orders to the contrary.

(2) A student who is denied participation in the Oregon Promise program may appeal the denial to the Commission. The appeal shall be submitted in writing a minimum of ten days before the meeting at which the appeal is to be considered.

Statutory/Other Authority: ORS 341.522

Statutes/Other Implemented: ORS 341.522

History:

OSAC 2-2016, f. & cert. ef. 4-21-16

575-039-0140

Application Process

(1) Applicants must complete and submit the Free Application for Federal Student Aid, if eligible for federal student aid programs. Applicants who are not eligible for federal financial aid because of their citizenship status must complete the Oregon Student Aid Application, which is the alternate need analysis form that has been approved by the Commission.

(2) Applicants must submit the Oregon Promise application, which has been designated for this purpose by the Commission, and grade transcripts as specified in the Oregon Promise application.

(3) Applications must be filed during the timeframe established by the Commission.

Statutory/Other Authority: ORS 341.522

Statutes/Other Implemented: ORS 341.522

History:

OSAC 2-2016, f. & cert. ef. 4-21-16

575-039-0150

Requirements for Dually Enrolled Students

The Commission will prescribe eligibility requirements and grant calculations for students dually enrolled in a community college and a public university.

(1) For the Oregon Promise Grant, a dually enrolled, or co-enrolled, student is a student who attends more than one eligible institution during the same academic term or year under a written consortium agreement or concurrent enrollment program. The student's "home" institution is the institution that grants a certificate or degree upon the student's completion of an eligible program of student. It is the institution that determines the student's eligibility for federal and state financial aid, disburses funds to the student, and is responsible for reporting enrollment and disbursement information to the Commission.

(2) For students who are dually enrolled in two or more community colleges, the Oregon Promise grant award will be based on the tuition charged by the student's "home" institution or the average tuition charged by all community colleges, whichever is lower.

(3) For students who are dually enrolled in a pathways program between an Oregon community college and an Oregon public university, the Oregon Promise grant award will be based on the enrollment status and tuition charged only for courses taken at the community college.

Statutory/Other Authority: ORS 341.522

Statutes/Other Implemented: ORS 341.522

History:

OSAC 2-2016, f. & cert. ef. 4-21-16

HIGHER EDUCATION COORDINATING COMMISSION
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HIGHER EDUCATION COORDINATING COMMISSION
December 12, 2019
Docket Item #: 12.2

Docket Item:

Approve Permanent Rule Chapter 575: Oregon National Guard State Tuition Assistance Program

Summary:

House Bill 2817, passed in 2019, expands the current tuition assistance grant program for members of the Oregon National Guard. This program is used for resident tuition at Oregon public universities and community colleges, once all state and federal aid has been utilized. HB 2817 allows eligible Oregon National Guard members to use the grant program at Oregon Health and Science University and qualifying private institutions that meet the criteria set forth in ORS 348.597 (2). The program will also allow eligible Oregon National Guard members to use the grant program for undergraduate certificate programs at eligible institutions. Under HB 2817, expansion of the program will apply to tuition assistance for the 2020-2021 academic year.

Materials:

Rule Text.

Staff Recommendation:

Staff recommends approving permanent rule Chapter 575: Oregon National Guard State Tuition Assistance Program.

Higher Education Coordinating Commission

Division 67 - OREGON NATIONAL GUARD STATE TUITION ASSISTANCE

Statutory/Other Authority: 2018 Oregon Laws Chapter 53
Statutes/Other Implemented: 2018 Oregon Laws Chapter 53

History:

OSAC 3-2019, adopt filed 05/07/2019, effective 05/07/2019

575-067-0001 Definitions
575-067-0005 Student Eligibility Requirements
575-067-0010 Application Process
575-067-0015 Oregon National Guard State Tuition Assistance Calculation
575-067-0020 Record Keeping

575-067-0002
Definitions

(1) "Eligible institution" means any Oregon community college operated under ORS chapter 341, ~~or~~ any Oregon public university listed in ORS 352.002, Oregon Health and Science University, or a qualifying private nonprofit institution which meets the criteria defined in ORS 348.597(2) for exemption from ORS 348.597 to 348.615.

(2) "Good standing" means the qualified student has a cumulative grade point average of 2.0 or higher or is maintaining satisfactory academic progress as defined by the institution in accordance with federal Title IV regulations and guidelines.

(3) "Home Institution" means the institution that grants a certificate or degree upon the student's completion of an eligible program. It is the institution that determines the student's eligibility for federal and state financial aid, disburses funds to the student, and is responsible for determining applicant eligibility.

(4) "Tuition" means the amount charged to a student for a course and is based upon the number of credit hours for which the course is offered.

(5) "~~Certificate program~~Certificate of completion" ~~means a program or curriculum where a~~is a form of recognition ~~is~~ awarded by an eligible institution for meeting the minimum occupational course, curriculum or proficiency requirements at the undergraduate level. Certificates of completion for certificate programs must be state-approved, if so required by OAR 589-006-0300, have a defined job entry point, represent collegiate-level work, be credit bearing, and meet Commission standards (ORS 350.075, Powers, duties and functions; rules) and criteria. ~~For the Oregon National Guard State Tuition Assistance, only certificate programs below a baccalaureate degree are eligible to be used by qualified students.~~

575-067-0006
Student Eligibility Requirements

(1) In order to be eligible, a student must:

(a) Not have achieved a baccalaureate or higher degree from any post-secondary institution;

(b) Be enrolled and in good standing in a program or curriculum designed to lead to a certificate of completion, as defined by the Higher Education Coordinating Commission by rule, an associate degree granting program, or an undergraduate baccalaureate degree granting program at an eligible institution;

(c) Be a member of the Oregon National Guard and attending all scheduled unit training assemblies and annual training periods and not currently the subject of any adverse actions under the provisions of any Army, Air Force or National Guard Regulations;

(d) Have completed any military basic training in the United States Armed Forces;

(e) Complete and submit the Free Application for Federal Student Aid ~~(FAFSA)~~ for each academic year, if eligible to file the application, and accept all state and federal aid grants available;

(f) Have completed a National Guard Federal Tuition Assistance ~~(FTA)~~ or Military Tuition Assistance~~(MilTA)~~ request, if eligible, and have accepted all state and federal aid grants available, including but not limited to federal grants offered by the United States Department of Education and the United States Department of Defense; and

(g) Not be in default on any federal Title IV loan or owe a refund on federal Title IV funds previously disbursed, unless the institution disbursing funds determines that the student has made satisfactory arrangements to repay and has regained federal eligibility.

(2) The Oregon National Guard will confirm subsections (c), (d) and (f) of section 1 of this rule. Eligible institutions will confirm subsections (b) and (g) of section 1 of this rule. The Higher Education Coordinating Commission will confirm subsections (a) and (e) of section 1 of this rule.

~~(3) It is the responsibility of the student to notify the Higher Education Coordinating Commission of any FTA awards or federal grants.~~

(~~4~~ 3) A student continues to remain eligible to receive an Oregon National Guard State Tuition Assistance award until the student has 90 credit hours ~~attempted~~ completed at an eligible Oregon community college, or 180 credit hours ~~attempted~~ completed at an Oregon public university or the equivalent number of semester credit hours completed at a qualifying private nonprofit institution, ~~but not both~~ calculated cumulatively. If a student is currently enrolled in a degree program when first applying for Oregon National Guard State Tuition Assistance, only the student's previous ~~attempted~~ completed credit hours for that specific degree program will be counted towards the maximum allowable ~~attempted~~ completed credit hour limit.

(~~5~~ 4) In order to remain eligible for the Oregon National Guard State Tuition Assistance, students must remain in good standing.

(~~6~~ 5) Students attending eligible institutions may not receive an award in excess of the amount of resident tuition ~~minus~~ after first subtracting all state and federal aid grants available to the student. The source of the relevant tuition information shall be published annually by the Higher Education Coordinating Commission.

575-067-0011
Application Process

(1) Students shall submit an Oregon National Guard State Tuition Assistance application in addition to submitting a ~~Free Application for Federal Student Aid~~ FAFSA~~(FAFSA)~~ by~~by August 1~~ the deadline published by the Higher Education Coordinating Commission, Office of Student Access and Completion on the program website prior to enrollment in the next academic ~~year~~ term. The deadline is 5:00 pm (PST or PDT). If a deadline falls on a weekend or holiday, it will automatically be extended to 5:00 pm (PST or PDT) on the following business day.

(2) HECC may waive the requirement set forth in section (1) of this rule for a student who was unable to complete an Oregon National Guard State Tuition Assistance application due to a significant hardship or whose completion of active duty basic training requirements occurs after ~~August 1~~ the deadline published by the Higher Education Coordinating Commission, Office of Student Access and Completion on the program website prior to the academic ~~year~~ term for which they wish to enroll.

575-067-0016
Oregon National Guard State Tuition Assistance Calculation

(1) An eligible student shall receive an award in an amount that equals the resident tuition charges at ~~the eligible institution~~ Oregon public universities, the Oregon Health and Science University, and community colleges that the student is attending. For qualifying private nonprofit institutions, the award amount shall equal the average base resident tuition rate of all Oregon public universities.

(a) For students who are dually enrolled in two or more colleges, the Oregon National Guard State Tuition Assistance award will be based on the resident tuition rate charged by the student's home institution.

(2) For the Oregon National Guard State Tuition Assistance program, a dually enrolled, or co-enrolled, student is a student who attends more than one eligible institution during the same academic term or year under a written consortium agreement or concurrent enrollment program.

~~(3) For students who are dually enrolled in two or more colleges, the Oregon National Guard State Tuition Assistance award will be based on the tuition charged by the student's home institution.~~

(3) A student can only be awarded program funds for courses that are a requirement for the declared degree-granting program ~~they are enrolled in.~~in which they are enrolled

575-067-0021
Record Keeping

(1) Each eligible institution shall maintain sufficient records to document its activities relating to the program~~.~~ by rule regarding student financial aid records (OAR 166-450-0045, OAR 166-475-0055).

(2) Each eligible institution shall make its academic and financial records available to the Higher Education Coordinating Commission upon request ~~at reasonable times~~ for the purpose of assuring that the institution is complying with the rules relating to the administration of the program

HIGHER EDUCATION COORDINATING COMMISSION
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Docket Item:

Approve administrative rule change to 715-045-0067 and adoption of new rule 715-045-0069.

Allowing for temporary closure of a private career school without loss of licensure. This is a temporary adoption of a new Administrative Rule and will be subject to normal Rule approval process.
Non-substantive changes will be made to 715-045-0067 to reflect the changes enacted by the new Temporary School Closure rule.

Summary:

This new Administrative Rule allows for private career schools under Oregon Revised Statutes chapter 345 to cease operations for up to twelve months without requiring the school to relinquish its license as currently required by Rule. Temporary Closure status is subject to approval by the Commission through the Executive Director. Temporary Closure status may be granted in cases where the school's facilities are unusable for a period of time, or when the owner or other principal staff are unable to perform their duties because of injury or illness. Schools with this status must make teach out arrangements or offer refunds to affected students. Temporarily closed schools must maintain their license for the duration of closure. Affected students are also eligible for access to Tuition Protection Funds through the Commission.

The Private Career Schools unit is aware of a situation with a currently licensed school that may require temporary closure; hence the need for temporary rule passage.

Docket Material:

See the attached Rule text.

Staff Recommendation:

Staff recommends the Commission move to approve administrative rule change to 715-045-0067 and adoption of new rule 715-045-0069.

School Closure
Alignment with new rule 715-045-0069 Temporary School Closure

715-045-0067
School Closure

(1) In the event a school closes, the school shall file a plan with the Higher Education Coordinating Commission designed to protect the contractual rights of its students and graduates, including the right to complete the course of instruction in which they were enrolled. The school shall return its license to the Cccommission immediately by certified mail upon cessation of instruction, except as provided in 715-045-0069.

(2) A school that is closing, either voluntarily or involuntarily, shall:

(a) Inform the Cccommission of this action by certified mail at least 30 calendar days prior to the anticipated cessation of instruction and other normal school business practices. Such notice shall detail the school's closure plan including:

(A) Teach-out arrangements (if made with another school);

(B) The name, address, and telephone number of the person, who will be responsible for closing arrangements;

(C) The name, address, telephone number, and the name of the course of instruction for every student who will not complete their course of instruction; and

(D) The amount of class time left for each student to complete the course with the amount of refund, if any, for which each student is eligible;

(b) Provide written notice to all registered and enrolled students of the school's closure plan at least 30 calendar days prior to closure;

(c) Furnish the Cccommission with copies of the written notice being mailed to all enrolled students explaining the procedures they are to follow to secure refunds or to continue their education;

(d) File procedures for disbursement of refunds with the Cccommission and set a date no later than 30 calendar days from the last day of instruction to issue refund checks in the full amount for which students are entitled; and

(e) Within four calendar days of its closing transfer permanent student transcripts and roster of all students enrolled at the time of closure to the Cccommission. All transcripts of students not enrolled at the time of closure are due to the Cccommission within 90 calendar days after closure.

(3) If students are receiving instruction prior to the school's closing, the school shall file a plan, approved by the Cccommission's Eeexecutive Ddirector, with the Cccommission to ensure that the school's students will continue to receive training of the same quality and content as that for which they contracted.

(4) If the Eeexecutive Eddirector, in any situation in which students are receiving instruction prior to a school's closing, determines that the school has not fulfilled its contractual obligations or that a student has reasonable and justifiable objections to the proposed transfer resulting from the closing, the school shall refund all tuition, fees, and other charges as related to OAR 715-045-0026(6).

(5) If the school to be closed offers a combination of distance learning and resident training, the school shall refund the entire cost of both the distance learning and resident portion paid.

School Closure
Alignment with new rule 715-045-0069 Temporary School Closure

(6) Any school owner, including a corporation and/or any of its officers, involved in the decision to close a school in violation of this section will not be granted a license to operate any other private career school in Oregon.

(7) When a school closes or ceases operation, for any reason, its license is automatically revoked effective the day following the date of closure or cessation of operations, except as provided in 715-045-0069.

New Rule: Temporary School Closure
For temporary adoption by the Commission, December 13, 2019
Final Adoption scheduled in February 2020.

715-045-0069
Temporary School Closure

(1) The Commission may designate a school as temporarily closed if the following conditions are met:

(a) The school must request "temporary closure" designation in writing from the Commission, subject to approval of the Executive Director. That request must state the reason(s) for the request for temporary closure status as set forth in (1)(b), including providing any documentation in support of the request as required by the Commission, and a projected timeline for the resumption of educational operations.

(b) The Commission may grant temporary closure status if the requesting school ceases educational operations due to unforeseeable or exigent circumstances including, but not limited to, property loss or damage due to fire, flood, or other natural disaster; or inability of the owner, manager, or other key staff to perform their duties due to extended illness or injury, as determined by the Executive Director.

(c) The Commission may grant temporary closure status to a school for not longer than twelve months from the date of first request for the designation. Temporary closure status shall not result in the revocation of the school's license so long as the school is in compliance with all relevant laws.

(d) Schools granted temporary closure status shall make notice, teach out, transfer and refund arrangements for currently enrolled students as provided in 715-045-0067 (2)(a) through (2)(d) if the Commission directs the school to do so.

(e) Schools in temporary closure status must respond to requests from students and the Commission for information, updates, and records within ten calendar days.

(f) Current students of schools granted temporary closure status by the Commission shall be eligible for refunds under the Tuition Protection Fund, subject to the limitations of 715-045-0029.

(g) A school designated for temporary closure must maintain its license for the duration of the temporary closure.

(h) A school on temporary closure status that is required to make Tuition Protection Fund payments shall continue to make regular payments subject to the requirements of 715-045-0029.

Statutory Authority: 345.020

Statutes Implemented 345.020, 345.030, 345.110, and 345.120