
Docket Item:

Update on Higher Education Emergency Relief Fund (HEERF) Spending

Summary:

Across three pandemic-related federal relief acts, the federal government provided \$781.1 million to 67 Oregon institutions. As of January 31, 2022, institutions have spent \$535.5 million, or 69% of that total. Of that amount, institutions dedicated \$240.1 million to emergency financial aid and \$295.4 million to support institutional budgets.

Docket Material:

In March 2020, the Coronavirus Aid, Relief, and Economic Security Act (CARES Act) was signed into law. It established the Education Stabilization Fund (ESF) through the U.S. Department of Education (DOE). The Coronavirus Response and Relief Supplemental Appropriations Act (CRRSA Act), was signed into law in December 2020, and the American Rescue Plan Act (ARP Act) was signed in March 2021. Both added additional funding to the ESF.

The ESF is composed of three primary emergency relief funds: (1) a Governor's Emergency Education Relief (GEER) Fund, (2) an Elementary and Secondary School Emergency Relief (ESSER) Fund, and (3) a Higher Education Emergency Relief (HEER) Fund. Focusing on the HEER fund specifically, the total available for the HEER fund across all three acts is \$74.9 billion, with \$30.0 billion of that earmarked specifically for emergency student aid.

The share of HEER for Oregon totaled \$781.1 million, divided across 67 public and private institutions of higher education. The funding is distributed directly to the institutions with the State of Oregon having no input on the amounts allocated, the uses of funding, or the distribution of funding. Appendix B includes federal guidance provided to the institutions on the use of funds.

A November 2021 [survey](#) of college presidents by the American Council on Education found that HEERF enabled:

- 93% of colleges to provide direct financial support to students at risk of dropping out
- 81% of colleges to keep student net prices similar to pre-pandemic levels
- 70% of colleges to continue to employ faculty, staff, and other employees otherwise at risk of unemployment
- 63% of colleges to keep students and faculty safe by purchasing tests, health screenings, and health care

Thousands of colleges and universities nationally are using HEERF to keep students enrolled and on track to graduate, as well as make college more affordable by providing emergency grants, discharging outstanding student debt or unpaid balances, and eliminating transcript withholding practices.

The institutions are required to provide quarterly reporting to the US Department of Education on how they use the funds. A dedicated website for tracking, collecting, and disseminating data related to the ESF is managed by the US DOE and can be found on their website at: <https://covid-relief-data.ed.gov/>.

Reported data from that website for Oregon institutions has been summarized and included in Appendix A. Of the \$781.1 million awarded, a total of \$535.5 million has been spent as of January 31, 2022. This includes \$240.1 million spent for the student portion and \$295.4 million for the institution portion.

Although institutions can use their portion of funding for expenses generally associated with the coronavirus response across sixteen categories of expense as noted below, they report using at least \$31.2 million on additional emergency aid to students and for tuition reimbursements and refunds. The institutions can report using their portion for the following categories:

- Additional emergency aid to students
- Tuition reimbursement
- Tuition discounts
- Technology reimbursement
- Technology hardware
- Campus safety
- Distance learning supplies
- High speed internet
- Housing
- Food
- Additional class sections
- Equipment and supplies
- Lost revenue due to reduced enrollment
- Lost revenue due to non-tuition sources
- Faculty and staff training
- Other uses

Staff Recommendation:

For discussion and informational purposes only.

Appendix A – HEERF Distributions

Grantee	Funds Awarded	Funds Spent	% Spent	Student Portion	Institution Portion
All Private Institutions	103,711,944	81,255,327	78%	36,774,716	44,480,611
Public Universities					
EASTERN OREGON UNIVERSITY	8,626,139	4,974,389	58%	3,115,073	1,859,316
OREGON HEALTH & SCIENCE UNIVERSITY	5,508,944	4,907,183	89%	2,482,959	2,424,224
OREGON INSTITUTE OF TECHNOLOGY	13,287,011	4,085,838	31%	3,577,004	508,834
OREGON STATE UNIVERSITY	88,479,249	61,726,983	70%	33,580,508	28,146,475
PORTLAND STATE UNIVERSITY	105,947,526	66,873,387	63%	30,762,959	36,110,429
SOUTHERN OREGON UNIVERSITY	21,032,837	20,510,841	98%	8,695,578	11,815,263
UNIVERSITY OF OREGON	83,062,534	51,092,541	62%	26,821,557	24,270,984
WESTERN OREGON UNIVERSITY	23,652,638	21,331,669	90%	8,147,285	13,184,384
Subtotal, Public Universities	349,596,878	235,502,830	67%	117,182,922	118,319,908
Community Colleges					
BLUE MOUNTAIN COMMUNITY COLLEGE	6,837,768	3,593,450	53%	1,497,659	2,095,791
CENTRAL OREGON COMMUNITY COLLEGE	21,439,386	13,798,610	64%	7,069,859	6,728,751
CHEMEKETA COMMUNITY COLLEGE DISTRICT	42,827,728	24,828,700	58%	10,618,079	14,210,621
CLACKAMAS COMMUNITY COLLEGE	17,947,429	14,248,784	79%	6,657,628	7,591,156
CLATSOP COMMUNITY COLLEGE	3,627,786	1,695,165	47%	566,146	1,129,019
COLUMBIA GORGE COMMUNITY COLLEGE	3,191,807	3,191,807	100%	1,208,120	1,983,687
KLAMATH COMMUNITY COLLEGE	6,336,648	2,718,726	43%	1,453,729	1,264,997
LANE COMMUNITY COLLEGE	28,892,106	18,980,121	66%	8,619,260	10,360,861
LINN-BENTON COMMUNITY COLLEGE	20,237,061	11,806,317	58%	4,593,630	7,212,687
MT HOOD COMMUNITY COLLEGE	26,516,034	13,576,421	51%	5,043,895	8,532,527
OREGON COAST COMMUNITY COLLEGE	297,206	-	0%	-	-
PORTLAND COMMUNITY COLLEGE	100,855,065	76,863,080	76%	26,144,332	50,718,748
ROGUE COMMUNITY COLLEGE DISTRICT	22,429,784	15,606,912	70%	6,370,578	9,236,334
SOUTHWESTERN OREGON COMMUNITY COLLEGE	7,870,961	4,744,896	60%	2,154,895	2,590,001
TILLAMOOK BAY COMMUNITY COLLEGE	1,853,308	1,274,925	69%	507,554	767,371
TREASURE VALLEY COMMUNITY COLLEGE	8,122,224	5,631,131	69%	1,714,415	3,916,716
UMPQUA COMMUNITY COLLEGE	8,503,940	6,150,470	72%	1,921,154	4,229,316
Subtotal, Community Colleges	327,786,241	218,709,516	67%	86,140,933	132,568,583
TOTAL	781,095,063	535,467,673	69%	240,098,571	295,369,102

Data Source:

<https://covid-relief-data.ed.gov/profile/state/OR>

data as of 1/31/2022

Appendix B – HEER Funding Guidance

The full FAQ document for the American Rescue Plan (ARP) HEERF III can be found on the US DOE website at: <https://www2.ed.gov/about/offices/list/ope/arp.html>. The US Department of Education has automatically extended the performance period for all HEERF grants that have balances over \$1,000 to June 30, 2023.

Which students are eligible to receive emergency financial aid?

Any individual who is or was enrolled at an eligible institution on or after March 13, 2020, the date of the declaration of the national emergency due to the coronavirus. Students are no longer required to be eligible for Title IV student financial aid in order to receive HEERF grants. Undocumented and international students are now eligible as well as students studying abroad.

Institutions are required to prioritize students with exceptional need. US DOE encourages institutions to prioritize domestic students, especially undergraduates. Domestic students include citizens, permanent residents, refugees, asylum seekers, DACA recipients, other DREAMers, and similar undocumented students.

How may students use their emergency financial aid grants?

For any component of their cost of attendance or for emergency costs that arise due to the coronavirus such as tuition, food, housing, health care, or child care. Students determine how they may use their emergency financial aid grant within the allowable uses. The emergency financial aid grant is not taxable income, not counted in the EFC, and not included in the student's financial aid award package.

What are the allowable uses of funds for institutional purposes?

Defraying expenses associated with coronavirus including lost revenue, reimbursement for expenses already incurred, and technology costs associated with a transition to distance education which could include faculty and staff trainings and payroll. Institutions may also use this funding for making additional emergency financial aid grants to students and for discharging student debt.

Institutions are not allowed to use this funding for marketing or recruitment, endowments, capital outlays, senior administrator or executive salaries, benefits or bonuses, or construction including the purchase of real property.

If the Institutional Portion is not used entirely for emergency financial grants to students, a portion of funds must be used to: (a) implement evidence-based practices to monitor and suppress coronavirus in accordance with public health guidelines; and (b) conduct direct outreach to financial aid applicants about the opportunity to receive a financial aid adjustment due to the recent unemployment of a family member or independent student, or other circumstances.