State of Oregon

Higher Education Study

Formal Request for Proposal: OregonBuys #S-52500-00016858

HECC #25-207

Date of Issue: 5/5/2026 and Closing Date: 6/4/2026 **at 3:00 PM Pacific Time**

Single Point of Contact ("SPC"): Derek Dizney derek.dizney@hecc.oregon.gov and copy HECC.procurement@hecc.oregon.gov

1. INTRODUCTION

The State of Oregon, acting by and through the Higher Education Coordinating Commission ("HECC"), is issuing this competitive, formal Request for Proposals ("RFP") for a consultant to conduct a study of the condition of Oregon's post-secondary education system and develop detailed recommendations for the design, implementation, and operation of a viable and superior institutional framework, as further described in this RFP.

HECC anticipates the award of one Contract from this RFP. The initial term of the Contract is anticipated to expire May 31, 2027. HECC reserves the right to amend the resulting Contract for related services and time as HECC determines necessary. HECC's budget for this work cannot exceed $2,000,000 total.

HECC is conducting this formal procurement under the authority of Oregon Laws 2025, Chapter 384, Section 4 and ORS 350.075.

This project will be completely funded with state appropriated dollars.

2. BACKGROUND

The Oregon legislature created HECC in 2011. Several years later, in 2013, the Oregon legislature significantly expanded HECC's role while also establishing a statewide system of independent universities and HECC. Independent boards at public universities and community colleges oversee and direct the missions and operations of each of the public higher education institutions. As a result, each respective post-secondary education institution has unique missions and serves distinct populations.

House Bill 4124 ("HB 4124"), passed with bipartisan support during the 2026 Oregon legislative session, asserts that market competition among the post-secondary education institutions has eroded cross-institutional collaboration, impaired focus on regional and state needs, and undermined public confidence in the system as a vital source of economic development and employment opportunities.

HB 4124 presents HECC with a large and consequential new task over the next year. The bill directs the HECC to study the condition of Oregon's postsecondary education system and develop recommendations for an improved framework that supports access to postsecondary education institutions for students across geographic locations; fuels regional and statewide economic development and employment opportunities; and improves the financial viability of each postsecondary institution and the system as a whole by addressing factors like enrollment, increased personnel costs, changes in federal law, and sector-specific inflationary costs.

The study (referred throughout this RFP as "study" and "project" interchangeably) must evaluate the distinct missions of each category of postsecondary institution and opportunities for collaboration, restructuring, or integration in the postsecondary system. HECC is required to consult with faculty, staff, students, and other public institution partners in the development of the report, and must preliminarily report to the Oregon legislature by October 1, 2026, and submit a final report by April 1, 2027.

Initially, HECC has contracted with Oregon Consensus to conduct an assessment that will inform the approach HECC takes to the project. Oregon Consensus has begun to conduct interviews and focus groups with interested parties including community college and university leaders, faculty, staff, students, unions, employers, tribal, and community leaders. Their assessment will attempt to help HECC define the project's guiding principles, determine who should sit at the project leadership table, how other interested parties should participate, and what relational dynamics may hinder/foster alignment among parties through the project. Their work will help inform HECC's subsequent process to complete the study on time and with meaningful contributions from the aforementioned interested parties.

3. THE PROJECT SCOPE

Consistent with requirements outlined in Section 1 of HB 4124 (2026 Regular Session), the Successful Proposer will:

(a) Study the condition of Oregon's post-secondary education system.

- The study must evaluate and make recommendations on each of the following subjects:
    - The distinct objectives and missions of each category of post-secondary education institution, including community colleges, public universities, regional university and research university, in consideration of key variables such as research, public services, instruction, academic programming, educational model, and the student population served; and
    - Opportunities for collaboration, restructuring or integration in the post-secondary education system.
- The study may evaluate and make recommendations on each of the following subjects:
    - Development of academic programs and specialties to support current and emerging regional and state economic development and workforce needs;
    - Criteria for the review of unnecessary program duplication across post-secondary education institutions and unmet program needs statewide;
    - Structures and supports to connect students and graduates to employers and employment opportunities;
    - Funding strategies, including strategies to foster collaboration, restructuring or integration in the post-secondary education system; and
    - Metrics of affordability for students and financial health for post-secondary education institutions.

(b) Develop detailed recommendations for the design, implementation, and operation of a viable and superior institutional framework that increases the resilience and sustainability of Oregon's postsecondary system:

- Supports access to post-secondary education institutions for students across geographic locations, including rural communities and other underserved populations;

- Fuels regional and statewide economic development and employment opportunities;

- Improves the financial viability of each post-secondary education institution in Oregon and the post-secondary education system as a whole, including by addressing projected enrollment, increased personnel costs, changes in federal law or priorities, sector-specific inflationary costs or other related factors; and

- In developing recommendations, the Successful Proposer shall engage the expertise of and consult public institutions of higher education, including faculty, staff, and students, and any other interested parties identified by HECC.

Proposers should identify which of the optional ("may evaluate") study items under part (a) are necessary and achievable in order to complete part (b). Proposers should itemize the price associated with each of those optional items.

4. Document Review

All proposers must review the following documents to inform the strategy and approach to responding to this RFP:

- Attachment C: Text of HB 4124, passed during the 2026 Oregon Regular Session.
- Attachment D: Report, *Spending and Efficiency in Oregon Public Universities*, adopted by the Commission 1/6/2026.
- Attachment E: Update, *Oregon Postsecondary Education System Study (HB 4124, 2026)*, provided to the Commission, 4/9/2026, item 8.0.
- Attachment F: NCHEMS Report, *Oregon Higher Education Landscape Study*, prepared for the Presidents of Oregon Public Universities and Oregon Community Colleges, September 2022, provided to the Commission, 11/10/2022, item 12.0a.
- Attachment G: Oregon Legislature's Joint Task Force On Student Success for Underrepresented Students in Higher Education, *Report on Findings and Recommendations for 2023 Legislative Session*, December 13, 2022.

Proposer must confirm that they have reviewed the documents by initializing Attachment A: Proposer Certification Sheet, #14.

5. Tasks and Deliverables

The proposed Tasks and Deliverables below are examples of what HECC thinks it may want. Proposers should use their experience and expertise to propose how the work shall progress. Further, the following expectations are shared to inform Proposers' proposals.

Data. Currently available data and reports will likely provide robust information in support of this work. HECC will provide a list of resources. HECC expects the Successful Proposer inventory and use existing institutional and statewide data before launching new data requests, and to use existing sources wherever possible. Any sharing of student level data from the HECC's Integrated Student Data System (ISDS) will require a separately executed data sharing and use agreement as defined by HECC.

Context from other states/systems. HECC expects the Successful Proposer to employ their experience and expertise with systems in other states to inform this work. Out-of-state models should be applied within an Oregon context that is informed by interested parties.

Engagement with interested parties. As evidenced by Task #3 specifically, HECC expects the Successful Proposer to engage with interested parties through various means which will include significant in-person collaboration. A degree of interaction on the ground in Oregon with various parties, engagement in a shared sense making process helping parties arrive at a shared understanding of the challenges, serving as a resource for the project leadership team on an ongoing basis, and providing routine updates and feedback opportunities are all important to the progress of this work.

Task #1: Kick-Off Meeting and Memorandum

The Successful Proposer will facilitate a Kick-Off Meeting with HECC staff and the project leadership team to be scheduled as soon as possible after the review of documents is complete. The objective of the Kick-Off Meeting will be to discuss the scope of the work, to discuss the study strategy the Successful Proposer envisions, to review the timeline, and to provide the support needed to the Successful Proposer for the creation of the Kick-Off Memorandum.

Deliverables: Two deliverables: 1) Meeting held with HECC staff and project leadership team. 2) Project Kick-Off Memorandum that confirms the project scope, outlines initial data requests, details a project study strategy, and offers a partner communication support plan.

Deadline: The Kick-Off Meeting to be held within 7 days of contract execution. The Memorandum is due 7 days after the Kick-Off Meeting is held.

Task #2: Communications Support

The Successful Proposer will implement a HECC-approved communication support plan, part of the deliverables for Task #2, to enhance interested party engagement as work progresses on meeting the requirements identified in Section 3 of this RFP (the Project Scope). HECC envisions two deliverables associated with this task to be accomplished on an ongoing basis. Significant in-person collaboration is expected as part of this task.

Deliverables: Two deliverables: 1) The Successful Proposer will provide interested parties with project updates and engagement opportunities via appropriate communication mechanisms. Those may include focus groups, forums, social media, websites, and/or other tools that at a minimum a) provide semi-monthly updates pertaining to the progress of the project, and b) provide a feedback mechanism for interested parties to provide input. 2) The Successful Proposer will participate in at least four in-person community engagement sessions held in different regions of Oregon between August and December, likely held in connection with meetings of the project leadership team.

HECC reserves the right to require the work outlined in this task to be performed in collaboration with an existing, or newly engaged, contractor.

Deadline: Ongoing. To begin no later than 7 days after the completion of the deliverables for Task #2 and continue through March 1, 2027.

Task #3: Project Leadership Briefings

The Successful Proposer will brief the project leadership team on its work at regular meetings, held at least monthly throughout the duration of the project. Except for the four in-person meetings envisioned by Task #3, Deliverable #2, a remote participation option will be available. The Successful Proposer will provide written materials in connection with these briefings. Those materials should, at a minimum, summarize the project status, identify outstanding needs, and pose questions intended to elicit guidance and support sense-making from the project leadership team.

Task #4: Preliminary Report

The Successful Proposer will submit a Preliminary Report to the project leadership team and HECC staff summarizing initial findings and results from the study consistent with requirements Section 3 of this RFP (the Project Scope).

Deliverable: Preliminary Report with initial findings submitted to HECC for review, revision, and approval in a manner and format suitable for HECC to submit to the Oregon legislature.

Deadline: September 1, 2026

Task #5: Final Report

The Successful Proposer will submit a Final Report with findings and recommendations to the project leadership team and HECC staff for review and approval consistent with requirements in Section 1 of HB 4124 (2026 Regular Session) identified in Section 3 of this RFP (the Project Scope).

Deliverable: Final Report submitted to HECC for review and approval in a manner and format suitable for HECC to submit to the Oregon legislature. The Final Report should include an executive summary and supporting technical appendices.

Deadline: March 1, 2027

Task #6: Final Presentation

The Successful Proposer will provide a Final Presentation/briefings to HECC staff and the project leadership team, and potentially a limited number of Oregon legislative members and/or state leaders, as determined in HECC's sole discretion.

Deliverable: Final Presentation by Successful Proposer during HECC full commission meeting. This will include a public facing slide deck summarizing findings and recommendations.

Deadline: Early March 2027 (tentatively during the week of March 8 to 12, 2027)

6. REQUESTS FOR CLARIFICATION

Any requests for clarification must be submitted via email to HECC.Procurement@hecc.oregon.gov with a copy to Derek.Dizney@hecc.oregon.gov no later than 3:00 PM Pacific Time on May 21, 2026. The subject line should include a reference to this solicitation number, HECC #25-207 / OregonBuys #52500-00016858.

7. Proposal Submission

Proposals **must** be submitted through the state's electronic procurement system, OregonBuys, no later than 3:00 PM Pacific Time on June 4, 2026. The OregonBuys number is shown on the first page of this RFP. HECC cannot accept any proposals outside of the OregonBuys system. In order to submit a proposal, you must be registered in the OregonBuys system. Registration is free, and can be accessed by clicking the blue "Register" button on the top right corner of the OregonBuys website: https://oregonbuys.gov/bso/

8. Proposal Content Requirements

Proposals must address each of the items listed in this section and all other requirements set forth in this RFP. Proposer shall describe the Goods to be provided or the Services to be performed or both. A Proposal that merely offers to provide the Goods or Services as stated in this RFP will be considered non-Responsive to this RFP and will not be considered further.

A. Proposal Certification Sheet

The Proposer shall complete and submit the Proposer Information and Certification Sheet (Attachment A).

B. Introduction to Proposer and Proposer's Relevant Experience

Describe Proposer. Describe the firm. How long has it been in business? From which locations will the services be performed? How does Proposer support diversity, equity, inclusion, and accessibility? How does Proposer support responsible environmentally sustainable practices?

The Proposal must contain information that clearly demonstrates that Proposer has a minimum of three years of professional experience within the past five years, successfully providing services that are comparable to those described in this RFP.

HECC prefers Proposers that have experience working with a government entity.

Proposals should contain a discussion on Proposer's ability to successfully complete the Project on time and within budget.

C. Proposer's Implementation Plan

The Proposer shall describe how they intend to do the work. The description should include:

- Proposer's knowledge and understanding of the Project.
- The approach that Proposer will take in performing the work described in this RFP; must include a sample timeline and proposed schedule.
- If possible, how Proposer's plans will help HECC achieve the goals outlined in HECC's Equity Lens found here: https://www.oregon.gov/highered/strategy-research/Documents/Strategic-Plan/Equity-Lens.pdf. Working toward equity requires an understanding of historical contexts and the active investment in changing social structures and practice over time to ensure that individuals from all communities have

the opportunities and support to realize their full potential. HECC applies its Equity Lens to all aspects of its work.

- If possible, how Proposer's plans will further responsible, environmentally sustainable practices and products used in this Project.

D. **Key Person Experience and Resumes**

The Proposer should describe its relevant experience and include the resumes of all key staff to perform the Services.

E. **Cost Proposal**

For each activity described in the **Tasks and Deliverables Section** (Section 4 of this solicitation), the cost proposal must include identifiable costs, time estimates for completing each activity, and a summary of all proposed costs pertaining to each deliverable listed in accordance with the itemized activity. HECC prefers Proposals with a fixed fee per task/deliverable but will consider Proposals to state the hourly rates for Proposer's key staff performing the Services and a total not-to-exceed limitation per each task/deliverable.

F. **Agreement with Sample Contract**

The Proposer must note any exceptions to the terms and conditions contained in the Sample Contract attached as Attachment B to this solicitation. Failure to do so will be treated as agreement to the terms and conditions during contract negotiations.

9. EVALUATION

Proposals will be evaluated on the following criteria and scored out of 100 possible points:

Experience (30 points possible)

- How well has the Proposer demonstrated their experience in conducting studies and creating reports of this nature?
- How experienced is Proposer addressing state or system-level issues of higher education?
- How experienced is the Proposer in navigating issues of academic governance, institutional finance, and the engagement of diverse interests in higher education settings?
- Are the Proposer's designated key persons experienced and capable of performing the work?

Project Approach (45 points possible)

- How well does the Proposer clearly and concisely describe their intended approach to performing the work described in this solicitation?

- How well does the Project Approach demonstrate an understanding of the Project requirements?

- How well does the Proposer describe the approach that they will take to evaluating various options for system change?

- How does the Proposer intend to balance independent judgment with meaningful use of Oregon-based expertise drawn from its engagement process?

- How well does the Proposer describe a communications and engagement strategy that includes providing updates, gathering feedback, and reporting back on what they have heard?

- Does the Proposer offer any new or enhanced ideas to add value to the work described in this solicitation?

- Does the Proposer have experience with Tribal consultation or indicate how they will work with HECC and appropriate Oregon-based partners to ensure that consultation is respectful, complete, and well-informed?

- Does Proposer itself, or through their Project Approach further HECC's goals of diversity, equity, inclusion, and accessibility and environmentally sustainable practices?

Cost Proposal (10 points possible)

- How clearly and concisely does the Proposer convey the cost per deliverable?

- How clearly and concisely does the Proposer convey the basis on which prices are quoted?

- How well do the proposed costs align with the Proposer's Project Approach?

- What is the overall cost?

Resources (10 points possible)

- How well does the Proposer demonstrate they have the resources to successfully provide the Services described in this solicitation in the timeframe required by HECC?

Public Information/Past Performance (5 points possible)

- Publicly available information, if any, may be used to evaluate Proposers.

- Past performance with State of Oregon agencies, if any, may be used to evaluate Proposers.

Proposers will be ranked in order of median scores calculated from points awarded by a scoring evaluation committee. After an initial evaluation session, HECC may ask leading Proposers for interviews and/or presentations. If subsequent rounds are utilized, HECC

reserves the right to add scoring from subsequent rounds to the initial round of scoring or as stand-alone scoring for selection of a Successful Proposer. HECC further reserves the right for subsequent rounds of scoring to use the same scoring criteria as the initial scoring round, or to determine different criteria for the subsequent round(s), for example, only scoring interviews/presentations on Proposers' Project Approaches.

10. AWARD AND PROTEST

A. Intent to Award Notice

HECC will notify all Proposers in Writing that HECC intends to award a Contract to the selected Proposer(s) subject to successful negotiation of any negotiable provisions.

B. Intent to Award Protest

i. Protest Submission

An Affected Proposer shall have seven calendar days from the date of the Notice of Intent to Award to file a written protest.

A Proposer is an Affected Proposer only if Proposer would be eligible for Contract award in the event the protest was successful and is protesting for one or more of the following reasons as specified in ORS 279B.410:

- All higher ranked Proposals are non-Responsive.
- HECC has failed to conduct an evaluation of Proposals in accordance with the criteria or process described in the RFP.
- HECC abused its discretion in rejecting the protestor's Proposal as non-Responsive.
- HECC's evaluation of Proposals or determination of award otherwise violates ORS Chapter 279B or ORS Chapter 279A.

If HECC receives only one Proposal, HECC may dispense with the intent to award protest period and proceed with Contract Negotiations and award.

ii. Protest of Award

Protests to the Intent to Award, if any, must be delivered to the SPC via email or hard copy, must be signed by an authorized representative, and must be received within 7 calendar days of the date of the Notice of Intent to Award, and must:

- Reference the HECC number and OregonBuys bid solicitation number
- Identify prospective Proposer's name and contact information
- Specify the grounds for the protest

iii. Response to Protest

HECC will address all timely submitted protests within a reasonable time and will issue a written decision to the respective Proposer. Protests that do not include the required information may not be considered by HECC.

11. Successful Proposer Requirements

A. Insurance

Prior to execution of the Contract, the apparent Successful Proposer shall secure and demonstrate to HECC proof of commercial general liability insurance coverage in the amounts of $1,000,000 per occurrence and $2,000,000 aggregate, unless otherwise negotiated. Policies can usually be obtained for short-term durations for relatively low cost—please consult an insurance broker if you do not already carry the above-described insurance.

B. Taxpayer Identification Number

The apparent Successful Proposer shall provide its Taxpayer Identification Number on a completed W-9 form (which can be found here: https://www.irs.gov/pub/irs-pdf/fw9.pdf). The apparent Successful Proposer must provide its backup withholding status on the W-9 form if either of the following applies:

1. When requested by HECC (normally in an intent to award notice), or
2. When the backup withholding status or any other information of Proposer has changed since the last submitted W-9 form, if any.

HECC will not make any payment until HECC has a properly completed W-9.

C. Business Registry

If selected for an award, Proposer shall be duly authorized by the State of Oregon to transact business in the State of Oregon before executing the Contract. The selected Proposer shall submit a current Oregon Secretary of State Business Registry number, or an explanation if not applicable.

All Corporations and other business entities (domestic and foreign) must have a Registered Agent in Oregon. See requirements and exceptions regarding Registered Agents. For more information, see Oregon Business Guide, How to Start a Business in Oregon and Laws and Rules. The titles in this subsection are available at the following Internet site: http://www.filinginoregon.com/index.htm.

12. Additional Information

A. Governing Laws

This RFP is governed by the laws of the State of Oregon. After exhaustion of administrative procedures and remedies as set forth in this RFP, ORS 279B.400 to 279B.425, and OAR Chapter 137, division 47, venue for any judicial review relating to this RFP, evaluation and award is the Circuit Court of Marion County for the State of Oregon.. In no event shall this Section be construed as a waiver by the State of Oregon of any form of defense or immunity, whether sovereign immunity, governmental immunity, immunity based on the Eleventh Amendment to the Constitution of the United States or otherwise, to or from any Claim or from the jurisdiction of any court.

B. **Ownership**

All Proposals submitted in response to this RFP become the Property of HECC. By submitting a Proposal in response to this RFP, Proposer grants the State a non-exclusive, perpetual, irrevocable, royalty-free, fully paid-up, worldwide license for the rights to copy, distribute, display, prepare derivative works of and transmit the Proposal solely for the purpose of evaluating the Proposal, negotiating an Agreement, if awarded to Proposer, or as otherwise needed to administer the RFP process, and to fulfill obligations under Oregon Public Records Law (ORS 192.311 through 192.478). Proposals, including supporting materials, will not be returned to Proposer unless the Proposal is submitted late.

C. **Cost of Submitting Material**

Proposer shall pay all the costs in submitting its Proposal, including, but not limited to, the costs to prepare and submit the Proposal, costs of samples and other supporting materials, or costs to participate in demonstrations.

D. **Statewide E-waste**

If applicable, Proposer shall include information in its Proposal that demonstrates compliance with the Statewide E-Waste/Recovery Procedure 107-011-050_PR. Download the procedure by visiting www.oregon.gov/DAS, then enter the procedure number into the search bar, and find the procedure in the search results window.

E. **Recyclable Products**

Proposer shall use recyclable products to the maximum extent economically feasible in the performance of the Services or Work set forth in this document and the subsequent Contract. (ORS 279B.025)

F. **Printing, Binding Work**

Except as provided in ORS 282.210(2), all printing, binding and stationery work, including the manufacture of motor vehicle registration plates and plates required to be affixed to motor carriers, for the State or any county, city, town, port district, school district, or other political subdivision, must be performed within the State of Oregon.

ATTACHMENT A — PROPOSAL CERTIFICATION SHEET

Legal Name of Proposer: _____

Address: _____ **City, State, Zip:** _____

State of Incorporation: _____ **Entity Type:** _____

Contact Name: _____ **Telephone:** _____ **Email:** _____

Any individual signing below hereby certifies they are an authorized representative of Proposer and that:

1. Proposer understands and accepts the requirements of this RFP. By submitting a Proposal, Proposer agrees to be bound by the Contract terms and conditions in Attachment C and as modified by any Addenda, except for those terms and conditions that Agency has reserved for negotiation, as identified in the RFP.

2. Proposer acknowledges receipt of any and all Addenda to this RFP.

3. Proposal is a Firm Offer for 180 days following the Closing.

4. If awarded a Contract, Proposer agrees to perform the scope of work and meet the performance standards set forth in the final negotiated scope of work of the resulting Contract.

5. I have knowledge regarding Proposer's payment of taxes and by signing below I hereby certify that, to the best of my knowledge, Proposer is not in violation of any tax laws of the state or a political subdivision of the state, including, without limitation, ORS 305.620 and ORS chapters 316, 317 and 318.

6. Proposer does not discriminate in its employment practices with regard to race, creed, age, religious affiliation, gender, disability, sexual orientation, national origin. When awarding subcontracts, Proposer does not discriminate against any business certified under ORS 200.055 as a disadvantaged business enterprise, a minority-owned business, a woman-owned business, a business that a veteran owns or an emerging small business. If applicable, Proposer has, or will have prior to contract execution, a written policy and practice, that meets the requirements described in ORS 279A.112, of preventing sexual harassment, sexual assault and discrimination against employees who are members of a protected class. HECC may not enter into a contract with an anticipated contract price of $150,000 or more with a Proposer that does not certify it has such a policy and practice. See https://www.oregon.gov/DAS/Procurement/Pages/hb3060.aspx for additional information and sample policy template.

7. Proposer complies with ORS 652.220 and does not unlawfully discriminate against any of Proposer's employees in the payment of wages or other compensation for work of comparable character on the basis of an employee's membership in a protected class. "Protected class" means a group of persons distinguished by race, color, religion, sex, sexual orientation, national origin, marital status, veteran status, disability or age.

   Contractor's continuing compliance constitutes a material element of this Contract and a failure to comply constitutes a breach that entitles Agency to terminate this Contract for cause.

Contractor may not prohibit any of Contractor's employees from discussing the employee's rate of wage, salary, benefits, or other compensation with another employee or another person. Contractor may not retaliate against an employee who discusses the employee's rate of wage, salary, benefits, or other compensation with another employee or another person.

8. Proposer and Proposer's employees, agents, and subcontractors are not included on:

A. the "Specially Designated Nationals and Blocked Persons" list maintained by the Office of Foreign Assets Control of the United States Department of the Treasury found at: https://www.treasury.gov/ofac/downloads/sdnlist.pdf., or

B. the government-wide exclusions lists in the System for Award Management found at: https://www.sam.gov/SAM

9. Proposer certifies that, to the best of its knowledge, there exists no actual or potential conflict between the business or economic interests of Proposer, its employees, or its agents, on the one hand, and the business or economic interests of the State, on the other hand, arising out of, or relating in any way to, the subject matter of the RFP. If any changes occur with respect to Proposer's status regarding conflict of interest, Proposer shall promptly notify the State in writing.

10. Proposer certifies that all contents of the Proposal (including any other forms or documentation, if required under this RFP) and this Proposal Certification Sheet are truthful and accurate and have been prepared independently from all other Proposers, and without collusion, fraud, or other dishonesty.

11. Proposer understands that any statement or representation it makes, in response to this RFP, if determined to be false or fraudulent, a misrepresentation, or inaccurate because of the omission of material information could result in a "claim" (as defined by the Oregon False Claims Act, ORS 180.750(1)), made under Contract being a "false claim" (ORS 180.750(2)) subject to the Oregon False Claims Act, ORS 180.750 to 180.785, and to any liabilities or penalties associated with the making of a false claim under that Act.

12. Proposer acknowledges these certifications are in addition to any certifications required in the Contract and Statement of Work in Attachment C at the time of Contract execution.

13. Proposer is registered in the State's electronic procurement system, OregonBuys, found here: https://oregonbuys.gov/bso/. (Registration is free by clicking the blue "Register" button on the top right corner of the webpage.)

14. Proposer confirms they have read the documents described in Section 4 of the RFP.

_____ _____

Authorized Signature Date

_____

(Printed Name and Title)

ATTACHMENT G — SAMPLE CONTRACT

STATE OF OREGON
CONTRACT FOR SERVICES

This Contract for Services (this "Contract") is between the State of Oregon ("State") acting through its Higher Education Coordinating Commission ("HECC"), and _____ ("Contractor") and is effective as of the Effective Date.

Contractor's Contract Administrator for this Contract is:

Contractor Contract Administrator
Street Address
City, State Zip
Phone: Phone Number
Email: E-mail

HECC's Contract Administrator for this Contract is:

HECC Contract Administrator
3225 25th Street SE
Salem, OR 97302
Phone: Phone Number
Email: E-mail

Either party may change its Contract Administrator by providing the other notice in compliance with Section 17.6 of this Contract.

1. **CONTRACT TERM.**
The "Effective Date" of this Contract is the date this Contract has been fully executed by each party and, approved as required by applicable law. Unless extended or terminated earlier in accordance with its terms, this Contract terminates on _____. The termination of this Contract will not extinguish or prejudice HECC's right to enforce this Contract with respect to any default by Contractor that has not been cured.

2. **CONTRACT DOCUMENTS.**
This Contract consists of the following documents, which are listed in descending order of precedence:

- This contract less all exhibits;
- Exhibit A (Statement of Work); and
- Exhibit B (Required Insurance).

The foregoing documents and Exhibits are attached hereto and made a part of the Contract by this reference.

3. **SERVICES.**

3.1. Performance of Services. Contractor shall perform the services (the "Services") and deliver to HECC the deliverables ("Deliverables") set forth in Exhibit A, the Statement of

Work (the "Statement of Work"). The Statement of Work includes the delivery schedule for the Deliverables and Services. Contractor shall perform the Services in accordance with the terms and conditions of this Contract.

3.2. Submission and Acceptance of Deliverables. When the Statement of Work requires Contractor to deliver Deliverables to HECC, then Contractor shall deliver Deliverables that comply with the requirements and acceptance criteria set forth in the Statement of Work.

3.3. Rejection of Deliverables; Corrections. If HECC determines that a Deliverable(s) does not have the characteristics or otherwise meet the acceptance criteria set forth in the Statement of Work in all material respects, HECC will notify Contractor in writing of HECC's rejection of the Deliverable(s) and describe in reasonable detail in such notice HECC's basis for rejection of the Deliverable(s). Upon receipt of notice of non-acceptance, Contractor shall, within a 15 business day period, modify or improve the Deliverable(s) at Contractor's sole expense so that the Deliverable(s) has the characteristics described in the Statement of Work and meets, in all material respects, the acceptance criteria, and notify HECC in writing that it has completed such modifications or improvements and re-tender the Deliverable(s) to HECC. Failure of the Deliverables to have the characteristics or meet in all material respects the acceptance criteria set forth in the Statement of Work after the second submission will constitute a default by Contractor. In the event of such default, HECC may either, (i) notify Contractor of such default and instruct Contractor to modify or improve the Deliverables as set forth in this Section, or (ii) notify Contractor of such default and pursue its remedies for default provided for by law or the terms of this Contract.

4. COMPENSATION.

4.1. Fixed Fees. HECC shall pay Contractor a fixed fee for each task/deliverable as described in Exhibit A - Statement of Work, in addition to any allowable expenses described in Section 4.6 below.

4.2. Not-to-Exceed Compensation. The maximum, not-to-exceed compensation payable to Contractor under this Contract, which includes any allowable expenses, is $_____. HECC will not pay Contractor any amount in excess of the not-to-exceed compensation of this Contract, and will not pay for Services performed before the Effective Date or after the expiration or termination of this Contract. If the maximum compensation is increased by amendment of this Contract, the amendment must be fully effective before Contractor performs Services subject to the amendment.

4.3. Method of Compensation. Contract performance shall be based on the tasks and deliverables described herein. Contractor shall invoice HECC based on work completed. All work must be performed to the satisfaction of HECC prior to release of payment for services.

4.4. Payments. Payments, including interim payments, to Contractor are subject to ORS 293.462, will be made only for completed and accepted Deliverables and Services, and will be made in accordance with the payment schedule and requirements set forth in Exhibit A - Statement of Work.

4.5. Invoices. Contractor shall submit invoices in accordance with the payment schedule set forth in Exhibit A - Statement of Work or, if no payment schedule is set forth therein, then no more frequently than once per month for accepted Deliverables and Services; regardless, any payments due shall be invoiced within 45 days of performance of the services or delivery of the goods. To be processed for payment, Contractor's invoice(s) must include the following information:

- Invoice date;
- HECC's Contract number: 25-207; OregonBuys # PO-52500-_____
- HECC's Contract Administrator;
- A detailed description of all Services performed, including
    - the dates Contractor performed the Services for which it is requesting payment; and
    - the total amount due and the payment address.

Contractor shall send invoices to the Contract Administrator at their email addressed listed in on the first page to this Contract, with a copy to HECC.finance@hecc.oregon.gov

4.6. Expenses. HECC will not pay or reimburse Contractor or any other third party for any expenses under this Contract other than those listed in Exhibit A – Statement of Work.

4.7. Funds Available and Authorized. Contractor will not be compensated for Services performed under this Contract by any agency or department of the State of Oregon other than HECC. HECC believes it has sufficient funds currently available and authorized for expenditure to make payments under this Contract within HECC's biennial appropriation or limitation. Contractor understands and agrees that HECC's payments under this Contract are contingent on HECC receiving appropriations, limitations, or other expenditure authority sufficient to allow HECC, in the exercise of its reasonable administrative discretion, to continue to make payments under this Contract.

5. CONTRACTOR'S PERSONNEL.

5.1. Key Persons. Contractor acknowledges and agrees that HECC selected Contractor, and is entering into this Contract, because of the special qualifications of Contractor's key persons identified in the Statement of Work (each a "Key Person" and, together, "Key Persons"). Neither Contractor nor a Key Person may delegate performance of the powers and responsibilities that a Key Person is required to provide under this Contract to another Contractor employee, subcontractor or agent without first obtaining the written consent of HECC. Further, Contractor may not re-assign or transfer a Key Person to other duties or positions such that the Key Person is no longer available to provide HECC with the required expertise, experience, judgment, and personal attention, without first obtaining HECC's written consent to such re-assignment or transfer, which HECC will not unreasonably withhold or delay. Notwithstanding the foregoing, Contractor may replace a Key Person in the event the Key Person is no longer available due to circumstances beyond Contractor's reasonable control, such as death, illness, or termination of employment with Contractor. In the event Contractor requests that HECC approve a re-assignment or transfer of a Key Person, or if Contractor must replace a Key Person, HECC may interview, review the qualifications of, and approve or reject the proposed replacement for the Key Person. Any such replacement must have substantially equivalent or better qualifications than the Key Person being replaced. Any replacement personnel approved by HECC in writing (email acceptable) will thereafter be deemed a Key Person for purposes of this Contract, and the Statement of Work will be deemed amended to include such Key Person.

5.2. Payment for Replacement Key Personnel. If HECC is paying Contractor on an hourly or other periodic basis, then Contractor will not charge HECC, and HECC will not pay, for a replacement Key Person while such replacement acquires the project knowledge and skills necessary to perform the Services. Such period of non-charge will be agreed upon by the parties.

5.3. **State Premises**. Contractor and Contractor staff shall comply with all policies, rules, procedures, and regulations established by HECC and the State for access to and activities in and around premises controlled by HECC or any other agency of the State.

6. INDEPENDENT CONTRACTOR; RESPONSIBILITY FOR TAXES AND WITHHOLDING.

6.1. **Independent Contractor.** Contractor shall perform all Services as an independent contractor. HECC reserves the right (i) to determine and modify the delivery schedule for the Services and (ii) to evaluate the quality of the Services; however, HECC may not and will not control the means or manner of Contractor's performance. Contractor is responsible for determining the appropriate means and manner of performing the Services.

6.2. **No Conflicts**. Contractor, by signature to this Contract, represents and warrants that Contractor's performance of the Services under this Contract creates no potential or actual conflict of interest as defined by ORS 244; and no statutes, rules or regulations of any State of Oregon or federal agency for which Contractor currently performs work would prohibit Contractor from performing the Services under this Contract.

6.3. **Affiliation**. Contractor understands and agrees that it is not an "officer," "employee," or "agent" of the State of Oregon, as those terms are used in ORS 30.265 or otherwise.

6.4. **Taxes and Benefits**. Contractor is responsible for all federal or state taxes applicable to compensation or payments paid to Contractor under this Contract and, unless required by applicable law, HECC will not withhold from such compensation or payments any amount to cover Contractor's federal or state tax obligations. Contractor is not eligible for any social security, unemployment insurance or workers' compensation benefits from compensation or payments paid to Contractor under this Contract, except as a self-employed individual.

7. SUBCONTRACTS, SUCCESSORS, AND ASSIGNMENTS.

7.1. **Subcontracts.** Contractor shall not enter into any subcontracts for any of the Services required by this Contract without HECC 's prior written consent. In addition to any other provisions HECC may require, Contractor shall include in any permitted subcontract under this Contract provisions to ensure that HECC will receive the benefit of subcontractor's performance as if the subcontractor were Contractor. HECC's consent to any subcontract does not relieve Contractor of any of its duties or obligations under this Contract.

7.2. **Successors and Assigns.** The provisions of this Contract are binding upon and inure to the benefit of the parties to this Contract, their respective successors, and permitted assigns, if any.

7.3. **No Assignment.** Contractor shall not assign or transfer any of its rights or delegate its obligations under this Contract without HECC's prior written consent.

8. REPRESENTATIONS AND WARRANTIES.

8.1. **Contractor's General Representations and Warranties.** Contractor represents and warrants to HECC that:

8.1.1. Contractor has the power and authority to enter into and perform this Contract;
8.1.2. This Contract, when executed and delivered, is a valid and binding obligation of Contractor enforceable in accordance with its terms;

8.1.3. Contractor shall, at all times during the term of this Contract, be qualified, professionally competent, and duly licensed to perform the Services;
8.1.4. Contractor prepared its proposal related to this Contract, if any, independently from all other proposers, and without collusion, fraud, or other dishonesty; and
8.1.5. Contractor (to the best of Contractor's knowledge, after due inquiry), for a period of no fewer than six calendar years preceding the Effective Date, faithfully has complied with:
8.1.5.1. All tax laws of this state, including but not limited to ORS 305.620 and ORS chapters 316, 317, and 318;
8.1.5.2. Any tax provisions imposed by a political subdivision of this state that applied to Contractor, to Contractor's property, operations, receipts, or income, or to Contractor's performance of or compensation for any work performed by Contractor;
8.1.5.3. Any tax provisions imposed by a political subdivision of this State that applied to Contractor, or to goods, services, or property, whether tangible or intangible, provided by Contractor;
8.1.5.4. Any rules, regulations, charter provisions, or ordinances that implemented or enforced any of the foregoing tax laws or provisions; and
8.1.6. Contractor has no undisclosed liquidated and delinquent debt owed to the State or any department or agency of the State.

8.2. Contractor's Performance Warranties.

8.2.1. Contractor has the skill and knowledge possessed by well-informed members of its industry, trade or profession and Contractor shall apply that skill and knowledge with care and diligence to perform the Services in a professional manner and in accordance with the highest standards prevalent in Contractor's industry, trade or profession;
8.2.2. The Services and each Deliverables delivered by Contractor pursuant to the Services will materially comply with any service descriptions, specifications, standards or requirements set forth in this Contract;
8.2.3. Except as otherwise provided in this Contract (including Section 9), Contractor shall transfer all Deliverables to HECC free and clear of any and all restrictions on or conditions of transfer, modification, licensing, sublicensing, direct or indirect distribution, or assignment, and free and clear of any and all liens, claims, mortgages, security interests, liabilities, and encumbrances of any kind; and
8.2.4. Except as otherwise set forth in this Contract, any subcontractors performing work for Contractor under this Contract have assigned all of their rights in the Deliverables to Contractor or HECC and no third party has any right, title or interest in any Deliverables supplied to HECC under this Contract.
8.2.5. Contractor shall not expose any HECC-provided data to artificial intelligence tools ("AI") without prior written authorization from HECC and applicable safeguards in place.

8.3. Warranties Cumulative. The warranties set forth in Section 8 are in addition to, and not in lieu of, any other warranties set forth elsewhere in this Contract.

9. OWNERSHIP OF WORK PRODUCT.

9.1. Definitions. As used in this Section 9, and elsewhere in this Contract, the following terms have the meanings set forth below:

9.1.1. "Contractor Intellectual Property" means any intellectual property owned by Contractor and developed independently from the Services.
9.1.2. "Third Party Intellectual Property" means any intellectual property owned by parties other than HECC or Contractor.

9.1.3. "Work Product" means everything that is originally made, conceived, discovered, or reduced to practice by Contractor or Contractor's subcontractors or agents (either alone or with others) pursuant to this Contract, including every invention, modification, discovery, design, development, customization, configuration, improvement, process, work of authorship, documentation, formula, datum, technique, know how, secret, or intellectual property right whatsoever or any interest therein (whether patentable or not patentable or registerable under copyright or similar statutes or subject to analogous protection).

9.2. **Original Works**. All Work Product created by Contractor pursuant to the Services, including derivative works and compilations of Work Product, and whether or not such Work Product is considered a work made for hire or an employment to invent, is the exclusive property of HECC. HECC and Contractor agree that such Work Product is "work made for hire" of which HECC is the author within the meaning of the United States Copyright Act. If for any reason the Work Product is not "work made for hire," Contractor hereby irrevocably assigns to HECC any and all of its rights, title, and interest in all Work Product, whether arising from copyright, patent, trademark, trade secret, or any other state or federal intellectual property law or doctrine. Upon HECC's reasonable request, Contractor shall execute such further documents and instruments necessary to fully vest such rights in HECC. Contractor forever waives any and all rights relating to Work Product, including without limitation, any and all rights arising under 17 USC §106A or any other rights of identification of authorship or rights of approval, restriction or limitation on use or subsequent modifications.

9.3. **License in Contractor Intellectual Property**. In the event that a Deliverable(s) delivered by Contractor under this Contract is a derivative work based on Contractor Intellectual Property, or is a compilation that includes Contractor Intellectual Property, Contractor hereby grants to HECC an irrevocable, non-exclusive, perpetual, royalty-free license to use, reproduce, prepare derivative works based upon, distribute copies of, perform and display the pre-existing elements of the Contractor Intellectual Property employed in the Deliverables, and to authorize others to do the same on HECC's behalf.

9.4. **License in Third Party Intellectual Property**. In the event that a Deliverable(s) delivered by Contractor under this Contract is a derivative work based on Third Party Intellectual Property, or is a compilation that includes Third Party Intellectual Property, Contractor shall secure on HECC's behalf and in the name of HECC an irrevocable, non-exclusive, perpetual, royalty-free license to use, reproduce, prepare derivative works based upon, distribute copies of, perform and display the pre-existing elements of the Third Party Intellectual Property employed in the Deliverables, and to authorize others to do the same on HECC's behalf.

9.5. **No Rights**. Except as expressly set forth in this Contract, nothing in this Contract may be construed as granting to or conferring upon Contractor any right, title, or interest in any intellectual property that is now owned or subsequently owned by HECC. Except as expressly set forth in this Contract, nothing in this Contract may be construed as granting to or conferring upon HECC any right, title, or interest in any Contractor Intellectual Property that is now owned or subsequently owned by Contractor.

9.6. **Marks**. Neither party grants the other the right to use its trademarks, trade names, service marks or other designations in any promotion or publication without prior written consent. Each party grants only the licenses and rights specified in this Contract.

9.7. **Competing Services**. Subject to the provisions of this Section 9, and Contractor's obligations with respect to Confidential Information, including as defined in Section 10,

nothing in this Contract precludes or limits in any way the right of Contractor to: (i) provide services similar to those contemplated in this Contract, or consulting or other services of any kind or nature whatsoever to any individual or entity as Contractor in its sole discretion deems appropriate, or (ii) develop for Contractor or for others, deliverables or other materials that are competitive with those produced as a result of the Services provided hereunder, irrespective of their similarity to the Deliverables delivered pursuant to this Contract. Each party is free to utilize any concepts, processes, know-how, techniques, improvements or other methods it may develop during the course of performance under this Contract free of any use restriction or payment obligation to the other.

10. CONFIDENTIAL INFORMATION.

10.1. Confidential Information. Contractor acknowledges that it and its employees, officers, directors, agents or subcontractors (collectively, "Contractor Staff") may, in the course of performing the Services under this Contract, be exposed to or acquire information that is confidential to HECC or HECC's clients. Any and all information of any form (including but not limited to records, files, papers, materials, documents, and communications in written, verbal, oral and electronic form) that Contractor or any Contractor Staff may come into contact with or that is obtained by Contractor or Contractor Staff in the performance of this Contract shall be considered for the purposes of this Contract the confidential information of HECC ("Confidential Information"). Contractor shall, and shall cause Contractor Staff to treat any reports or other documents or items (including software) that result from the use of the Confidential Information in the same manner as the Confidential Information. Confidential Information does not include information that (i) is or becomes (other than by disclosure by Contractor or Contractor Staff acquiring such information) publicly known or is contained in a publicly available document except to the extent applicable law still restricts disclosure; (ii) is furnished by HECC to others without restrictions similar to those imposed by this Contract; (iii) is rightfully in Contractor's possession without the obligation of nondisclosure prior to the time of its disclosure under this Contract; (iv) is obtained from a source other than HECC without the obligation of confidentiality, (v) is disclosed with the written consent of HECC, or; (vi) is independently developed by Contractor or Contractor Staff who can be shown to have had no access to the Confidential Information.

10.2. Non-Disclosure. Contractor shall hold, and shall cause Contractor Staff to hold, all Confidential Information in confidence, using the highest standard of care applicable, and shall not copy, reproduce, sell, assign, license, market, transfer, distribute, or otherwise dispose of, give, make available or disclose, in whole or in part, directly or indirectly, Confidential Information to third parties (other than its authorized subcontractors), or use Confidential Information for any purposes whatsoever other than the provision of Services to HECC hereunder, and shall advise Contractor Staff of their obligations to keep Confidential Information confidential. Contractor shall assist HECC in identifying and preventing any unauthorized use or disclosure of any Confidential Information. Without limiting the generality of the foregoing, Contractor shall advise HECC immediately in the event Contractor learns or has reason to believe that any person who has had access to Confidential Information has violated or intends to violate the terms of this Contract, and Contractor will at its expense cooperate with HECC in seeking injunctive or other equitable relief in the name of HECC or Contractor against any such person. Contractor shall not at any time during or after the term of this Contract, except as directed by HECC, disclose, directly or indirectly, any Confidential Information to any person, except in accordance with this Contract. Upon expiration or termination of this Contract or at HECC's request, Contractor shall deliver to HECC all documents, papers, and other matter in Contractor's possession that embody Confidential Information. Notwithstanding the foregoing and

unless otherwise specified in this Contract, Contractor may keep one copy of such Confidential Information necessary for quality assurance, audits and evidence of performance of the Services.

10.3. Confidentiality Policies. Contractor shall, upon HECC's request, provide its policies and procedures for safeguarding Confidential Information to HECC for HECC's review and consent. Such policies must address information conveyed in oral, written, and electronic format and include procedures for how Contractor will respond when a violation or possible violation occurs.

10.4. Injunctive Relief. Contractor acknowledges that breach of this Section 10, including disclosure of any Confidential Information, will cause irreparable injury to HECC that is inadequately compensable in damages. Accordingly, HECC may seek and obtain injunctive relief against the breach or threatened breach of the foregoing undertakings, in addition to any other legal remedies that may be available. Contractor acknowledges and agrees that the covenants contained herein are necessary for the protection of the legitimate business interests of HECC and are reasonable in scope and content.

10.5. Publicity. Contractor agrees that it will not disclose the form, content or existence of this Contract or any Deliverable(s) in any advertising, press releases or other materials distributed to prospective customers, or otherwise attempt to obtain publicity from its association with HECC or the State of Oregon, whether or not such disclosure, publicity or association implies an endorsement by HECC or the State of Oregon of Contractor's services, without the prior written consent of HECC.

11. INDEMNITY BY CONTRACTOR.

11.1. Claims. Contractor shall defend, save, hold harmless, and indemnify the State of Oregon and HECC and their officers, employees and agents from and against all third party claims, suits, actions, losses, damages, liabilities, costs (including attorneys' fees) and expenses (collectively, "Claims") of any nature whatsoever resulting from, arising out of, or relating to the activities of Contractor or its officers, employees, subcontractors, or agents under this Contract, including but not limited to, unauthorized disclosure of Confidential Information, professional malfeasance, infringement of intellectual property rights, intentional, willful, or wanton wrongful acts, and acts outside the scope of Services set forth in this Contract.

11.2. Legal Counsel. If Contractor is required to defend the State of Oregon or HECC or their officers, employees or agents under Section 11.1, then Contractor shall select legal counsel reasonably acceptable to the Oregon Attorney General to act in the name of, or represent the interests of, the State of Oregon, HECC or their officers, employees and agents. Such legal counsel must accept appointment as a special assistant attorney general under ORS chapter 180 before such action or representation. Further, the State of Oregon, acting by and through its Department of Justice, may assume its own defense, including that of its officers, employees and agents, at any time when in the State of Oregon's sole discretion it determines that (i) proposed counsel is prohibited from the particular representation contemplated; (ii) counsel is not adequately defending the interests of the State of Oregon or its officers, employees and agents; (iii) important governmental interests are at stake; or (iv) the best interests of the State of Oregon are served thereby. Contractor's obligation to pay for all costs and expenses includes those incurred by the State of Oregon in assuming its own defense or that of its officers, employees, and agents under (i) and (ii) above.

11.3. Damages to State Property and Employees. Contractor is liable for all Claims for personal injury, including death, damage to real property and damage to tangible and

intangible personal property of the State of Oregon or any of its employees, subcontractors or agents resulting from, arising out of, or relating to the intentional, reckless or negligent acts or omissions of Contractor or its officers, employees, subcontractors, or agents under this Contract.

11.4. CONTRACTOR IS NOT AUTHORIZED TO SETTLE OR COMPROMISE ANY CLAIM REFERENCED IN THIS SECTION WITHOUT THE EXPRESS WRITTEN CONSENT OF HECC.

12. LIMITATION OF LIABILITIES.

12.1. EXCEPT FOR LIABILITY ARISING OUT OF OR RELATED TO (i) SECTION 10, OR (ii) SECTION 11, CONTRACTOR'S LIABILITY FOR DAMAGES FOR ANY CAUSE WHATSOEVER SHALL BE LIMITED TO ONE AND ONE HALF TIMES THE MAXIMUM-NOT-TO-EXCEED AMOUNT OF THIS CONTRACT.

12.2. EXCEPT FOR LIABILITY TO THIRD PERSONS ARISING OUT OF OR RELATED TO (i) SECTION 10, OR (ii) SECTION 11, NEITHER PARTY WILL BE LIABLE TO THE OTHER FOR ANY LOST PROFITS, LOST SAVINGS, OR PUNITIVE, INDIRECT, EXEMPLARY, CONSEQUENTIAL, OR INCIDENTAL DAMAGES.

13. INSURANCE.

Contractor shall maintain insurance as set forth in Exhibit B.

14. DEFAULT; REMEDIES; TERMINATION.

14.1. Default by Contractor. Contractor will be in default under this Contract if:

14.1.1. Contractor institutes or has instituted against it insolvency, receivership or bankruptcy proceedings, makes an assignment for the benefit of creditors, or ceases doing business on a regular basis; or

14.1.2. Contractor no longer holds a license or certificate that is required for Contractor to perform its obligations under the Contract and Contractor has not obtained such license or certificate within 14 calendar days after HECC's notice or such longer period as HECC may specify in such notice; or

14.1.3. Contractor commits any material breach or default of any covenant, warranty, obligation, certification, or agreement under this Contract, fails to perform the Services under this Contract within the time specified herein or any extension thereof, or so fails to pursue the Services as to endanger Contractor's performance under this Contract in accordance with its terms, and such breach, default or failure is not cured within 14 calendar days after HECC's notice, or such longer period as HECC may specify in such notice; or

14.1.4. Contractor has liquidated and delinquent debt owed to the State of Oregon or any department or agency of the State.

14.2. HECC's Remedies for Contractor's Default. In the event Contractor is in default under Section 14.1, HECC may, at its option, pursue any or all of the remedies available to it under this Contract and at law or in equity, including, but not limited to:

14.2.1. Termination of this Contract under Section 14.6.2; or

14.2.2. Withholding all monies due for Services and Deliverables that Contractor has failed to deliver within any scheduled completion dates or has performed inadequately or defectively; or

14.2.3. Initiation of an action or proceeding for damages, specific performance, or declaratory or injunctive relief; or

14.2.4. Exercise of its right of setoff, and withholding of amounts otherwise due and owing to Contractor, without penalty; or

14.2.5. Undertaking collection by administrative offset, or garnishment if applicable, of all monies due for Services and Deliverables to recover liquidated and delinquent debt owed to the State of Oregon or any department or agency of the State. Offsets or garnishment may be initiated after the Contractor has been given notice if required by law.

14.3. Remedies Cumulative. The remedies set forth in Section 14.2 are cumulative to the extent the remedies are not inconsistent, and HECC may pursue any remedy or remedies singly, collectively, successively or in any order whatsoever. If a court determines that Contractor was not in default under Sections 14.1, then Contractor will be entitled to the same remedies as if this Contract was terminated pursuant to Section 14.6.1.

14.4. Default by HECC. HECC will be in default under this Contract if:

14.4.1. HECC fails to pay Contractor any amount pursuant to the terms of this Contract, and HECC fails to cure such failure within 30 calendar days after Contractor's notice or such longer period as Contractor may specify in such notice; or

14.4.2. HECC commits any material breach or default of any covenant, warranty, or obligation under this Contract, and such breach or default is not cured within 30 calendar days after Contractor's notice or such longer period as Contractor may specify in such notice.

14.5. Contractor's Remedies. In the event HECC terminates this Contract under Section 14.6.1, or is in default under Section 14.4, and whether or not Contractor elects to exercise its right to terminate the Contract under Section 14.6.3, Contractor's sole monetary remedy will be (i) with respect to Services compensable at a stated rate, a claim for unpaid invoices, time worked within any limits set forth in this Contract but not yet invoiced and authorized expenses incurred and interest, subject to ORS 293.462, and (ii) with respect to Deliverables-based Services, a claim for the sum designated for completing the Deliverables multiplied by the percentage of Services completed and accepted by HECC, less previous amounts paid and any claim(s) that HECC has against Contractor. In no event will HECC be liable to Contractor for any expenses related to termination of this Contract or for anticipated profits. If previous amounts paid to Contractor exceed the amount due to Contractor under this Section 14.5, Contractor shall pay immediately any excess to HECC upon written demand.

14.6. Termination.

14.6.1. HECC's Right to Terminate at its Discretion. HECC may terminate this Contract:

14.6.1.1. Upon 30 calendar days' prior written notice by HECC to Contractor;

14.6.1.2. Immediately upon written notice by HECC to Contractor if HECC fails to receive funding, appropriations, limitations, allotments or other expenditure authority at levels sufficient to pay for the Services or Work Products; or

14.6.1.3. Immediately upon written notice by HECC to Contractor if federal or state laws, regulations, or guidelines are modified or interpreted in such a way that HECC's purchase of the Services or Work Products under this Contract is prohibited or HECC is prohibited from paying for such Services or Work Products from the planned funding source.

14.6.2. HECC's Right to Terminate for Cause. In addition to any other rights and remedies HECC may have under this Contract, HECC may terminate this Contract immediately upon written notice by HECC to Contractor, or at such later date as HECC may establish in such notice, if Contractor is in default under Section 14.1.

14.6.3. Contractor's Right to Terminate for Cause. Contractor may terminate this Contract immediately upon written notice to HECC, or at such later date as Contractor may establish in such notice, if HECC is in default under Section 14.4.

14.7. Return of Property. Upon termination of this Contract for any reason whatsoever, Contractor shall immediately deliver to HECC all of HECC's property (including without limitation any Services or Work Products for which HECC has made payment in whole or in part) that is in the possession or under the control of Contractor in whatever stage of development and form of recordation such HECC property is expressed or embodied at that time.

14.8. Effect of Termination. Upon receiving a notice of termination of this Contract, Contractor shall immediately cease all activities under this Contract, unless HECC expressly directs otherwise in such notice of termination. Upon HECC's request, Contractor shall surrender to anyone HECC designates, all documents, research or objects or other tangible things needed to complete the Services and the Deliverables.

15. COMPLIANCE WITH LAW.

15.1. Compliance with Law Generally. Contractor shall comply with all federal, state and local laws, regulations, executive orders and ordinances applicable to Contractor and the Contract. HECC's performance under the Contract is conditioned upon Contractor's compliance with the obligations of contractors under ORS 279B.045, 279B.220, 279B.230 and 279B.235, which are incorporated by reference herein.

15.2. Compliance with Oregon Tax Laws.

15.2.1. Contractor shall, throughout the duration of this Contract, comply with all tax laws of this state and all applicable tax laws of any political subdivision of this state. For the purposes of this Section, "tax laws" includes the tax laws described in Section 8.1.5.1 through 8.1.5.4.

15.2.2. Any violation of Section 15.2.1 constitutes a material breach of this Contract. Further, any violation of Contractor's warranty in Section 8.1.5 of this Contract that Contractor has complied with the tax laws of this state and the applicable tax laws of any political subdivision of this state also constitutes a material breach of this Contract. Any violation entitles HECC to terminate this Contract, to pursue and recover any and all damages that arise from the breach and the termination of this Contract, and to pursue any or all of the remedies available under this Contract, at law, or in equity, including but not limited to:

15.2.2.1. Termination of this Contract, in whole or in part;

15.2.2.2. Exercise of the right of setoff, or garnishment if applicable, and withholding of amounts otherwise due and owing to Contractor without penalty; and

15.2.2.3. Initiation of an action or proceeding for damages, specific performance, declaratory or injunctive relief. HECC is entitled to recover any and all damages suffered as the result of Contractor's breach of this Contract, including but not limited to direct, indirect, incidental and consequential damages, costs of cure, and costs incurred in securing replacement Services.

15.2.3. These remedies are cumulative to the extent the remedies are not inconsistent, and HECC may pursue any remedy or remedies singly, collectively, successively, or in any order whatsoever.

15.3. Compliance with Federal Law. Contractor shall comply with all applicable federal laws.

15.4. Pay Equity Compliance. As required by ORS 279B.235 Contractor shall comply with ORS 652.220 and shall not discriminate against any of Contractor's employees in the payment of wages or other compensation for work of comparable character, the performance of which requires comparable skills, or pay any employee at a rate less than another for comparable work, based on an employee's membership in a protected class. "Protected class" means a group of persons distinguished by race, color, religion, sex, sexual orientation, national origin, marital status, veteran status, disability or age. Contractor's compliance with this Section constitutes a material element of this Contract and a failure to comply constitutes a breach that entitles HECC to terminate this Contract for cause.

Contractor may not prohibit any of Contractor's employees from discussing the employee's rate of wage, salary, benefits, or other compensation with another employee or another person. Contractor may not retaliate against an employee who discusses the employee's rate of wage, salary, benefits, or other compensation with another employee or another person.

16. GOVERNING LAW; VENUE AND JURISDICTION.

16.1. Governing Law. This Contract is governed by and construed in accordance with the laws of the State of Oregon without regard to principles of conflicts of law.

16.2. Venue and Jurisdiction. Any claim, action, suit or proceeding between HECC (or any other agency or department of the State of Oregon) and Contractor that arises from or relates to this Contract must be brought and conducted solely and exclusively within the Circuit Court of Marion County for the State of Oregon. CONTRACTOR, BY EXECUTION OF THIS CONTRACT, HEREBY CONSENTS TO THE IN PERSONAM JURISDICTION OF SAID COURTS. In no event may this Section be construed as (i) a waiver by the State of Oregon of any form of defense or immunity, whether it is sovereign immunity, governmental immunity, immunity based on the Eleventh Amendment to the Constitution of the United States or otherwise, from any claim, action, suit or proceeding, or (ii) consent by the State of Oregon to the jurisdiction of any court.

17. MISCELLANEOUS PROVISIONS.

17.1. Records Maintenance; Access. Contractor shall maintain all financial records relating to this Contract in accordance with generally accepted accounting principles. In addition, Contractor shall maintain any other records, books, documents, papers, plans, records of shipments and payments and writings of Contractor, whether in paper, electronic or other form, that are pertinent to this Contract ("Records") in such a manner as to clearly document Contractor's performance. Contractor acknowledges and agrees that HECC and the Oregon Secretary of State's Office and the federal government and their duly authorized representatives will have access to such financial records and other Records that are pertinent to this Contract, whether in paper, electronic or other form, to perform examinations and audits and make excerpts and transcripts. Contractor shall retain and keep accessible all such financial records and other Records for a minimum of 6 years, or such longer period as may be required by applicable law, following final payment and termination of this Contract, or until the conclusion of any audit, controversy or litigation arising out of or related to this Contract, whichever date is later.

17.2. Foreign Contractor. If Contractor is not domiciled in or registered to do business in the State of Oregon, Contractor shall promptly provide to the Oregon Department of Revenue and the Secretary of State Corporation Division all information required by those agencies relative to this Contract. Contractor shall demonstrate its legal capacity to perform the Services under this Contract in the State of Oregon prior to entering into this Contract.

17.3. Force Majeure. Neither HECC nor Contractor may be held responsible for delay or default caused by fire, riot, epidemic, natural disaster, acts of God, terrorist acts, or other acts of political sabotage, or war where such cause was beyond the reasonable control of HECC or Contractor, respectively. Contractor shall, however, make all reasonable efforts to remove or eliminate such a cause of delay or default and shall, upon the cessation of the cause, diligently pursue performance of its obligations under this Contract.

17.4. Survival. All rights and obligations cease upon termination or expiration of this Contract, except for the rights and obligations and declarations which expressly or by their nature survive termination of this Contract, including without limitation this Section 17.4, and provisions regarding Contract definitions, warranties and liabilities, independent Contractor status and taxes and withholding, maximum compensation, Contractor's duties of confidentiality, ownership and license of intellectual property and Deliverables, confidentiality and non-disclosure, Contractor's representations and warranties, control of defense and settlement, remedies, return of HECC property, dispute resolution, order of precedence, maintenance and access to records, notices, severability, successors and assigns, third party beneficiaries, waiver, headings, and integration.

17.5. Time is of the Essence. Contractor agrees that time is of the essence under this Contract.

17.6. Notice. Except as otherwise expressly provided in this Contract, any communications between the parties hereto or notices to be given hereunder must be given in writing by email, personal delivery, or mailing the same, postage prepaid, to Contractor or HECC at the email address, postal address or telephone number set forth in this Contract, or to such other addresses or numbers as either party may indicate pursuant to this Section 17.6. Any communication or notice so addressed and mailed is effective five business days after mailing. Any communication or notice given by personal delivery is effective when actually delivered. Any notice given by email is effective when the sender receives confirmation of delivery, either by return email, or by demonstrating through other technological means that the email has been delivered to the intended email address.

17.7. No Third-Party Beneficiaries. HECC and Contractor are the only parties to this Contract and are the only parties entitled to enforce the terms of this Contract. Nothing in this Contract gives, is intended to give, or may be construed to give or provide any benefit or right not held by or made generally available to the public, whether directly, indirectly or otherwise, to third persons unless such third persons are individually identified by name herein and expressly described as intended beneficiaries of the terms of this Contract.

17.8. Severability. The parties agree that if any term or provision of this Contract is declared by a court of competent jurisdiction to be illegal or otherwise invalid, the validity of the remaining terms and provisions will not be affected, and the rights and obligations of the parties will be construed and enforced as if the Contract did not contain the particular term or provision held to be invalid.

17.9. Merger Clause; Waiver. This Contract and attached exhibits constitute the entire agreement between the parties on the subject matter hereof. There are no understandings, agreements, or representations, oral or written, not specified herein regarding this Contract. No waiver, consent, modification or change of terms of this Contract will bind the parties unless in writing and signed by both parties and all necessary State approvals have been obtained. Such waiver, consent, modification or change, if made, will be effective only in the specific instance and for the specific purpose given. The failure of HECC to enforce any provision of this Contract in one instance will not constitute a waiver by HECC of its right to enforce that or any other provision.

17.10. Amendments. HECC may amend this Contract to the extent permitted by applicable statutes and administrative rules. No amendment to this Contract is effective unless it is in writing signed by the parties and has been approved as required by applicable law, unless explicitly stated in other Sections of this Contract.

17.11. Counterparts. This Contract may be executed in several counterparts, all of which when taken together constitute one agreement binding on all parties, notwithstanding that all parties are not signatories to the same counterpart. Each copy of the Contract so executed constitutes an original.

17.12. Oregon False Claims Act. Contractor acknowledges the Oregon False Claims Act, ORS 180.750 to 180.785, applies to any action by Contractor pertaining to this Contract, including the procurement process relating to this Contract, that constitutes a "claim" (as defined by ORS 180.750(1)). By its execution of this Contract, Contractor certifies the truthfulness, completeness, and accuracy of any statement or claim it has made, it makes, it may make, or causes to be made that pertains to this Contract. In addition to other penalties that may be applicable, Contractor further acknowledges that if it makes, or causes to be made, a false claim or performs a prohibited act under the Oregon False Claims Act, the Oregon Attorney General may enforce the liabilities and penalties provided by the Oregon False Claims Act against Contractor. Contractor understands and agrees that any remedy that may be available under the Oregon False Claims Act is in addition to any other remedy available to the State or HECC under this Contract or any other provision of law.

17.13. Certifications. The individual signing on behalf of Contractor hereby:

17.13.1. Certifies and swears under penalty of perjury to the best of the individual's knowledge that: (a) Contractor is not subject to backup withholding because (i) Contractor is exempt from backup withholding, (ii) Contractor has not been notified by the IRS that Contractor is subject to backup withholding as a result of a failure to report all interest or dividends, or (iii) the IRS has notified Contractor that Contractor is no longer subject to backup withholding; (b) s/he is authorized to act on behalf of Contractor, s/he has authority and knowledge regarding Contractor's payment of taxes, and to the best of her/his knowledge, Contractor is not in violation of any Oregon tax laws, including, without limitation, those tax laws listed in ORS 305.380(4), namely ORS Chapters 118, 314, 316, 317, 318, 320, 321 and 323 and Sections 10 to 20, Chapter 533, Oregon Laws 1981, as amended by Chapter 16, Oregon Laws 1982 (first special session); the elderly rental assistance program under ORS 310.657; and any local taxes administered by the Oregon Department of Revenue under ORS 305.620; (c) Contractor is an independent contractor as defined in ORS 670.600; and (d) the supplied Contractor tax identification numbers are true and accurate;

17.13.2. Certifies that, to the best of the undersigned's knowledge, Contractor has not discriminated against and will not discriminate against any disadvantaged business enterprise, minority-owned business, woman-owned business, business that service-disabled veteran owns or emerging small business certified under ORS 200.055 in obtaining any required subcontracts;

17.13.3. Certifies that Contractor has a written policy and practice that meets the requirements, described in ORS 279A.112, of preventing sexual harassment, sexual assault, and discrimination against employees who are members of a protected class. Contractor agrees, as a material term of the Contract, to maintain the policy and practice in force during the entire Contract term; and

17.13.4. Certifies that Contractor and Contractor's employees and agents are not included on the list titled "Specially Designated Nationals and Blocked Persons"

maintained by the Office of Foreign Assets Control of the United States Department of the Treasury and currently found at https://www.treasury.gov/ofac/downloads/sdnlist.pdf.

IN WITNESS WHEREOF, the parties have executed this Contract as of the dates set forth below.

Contractor

By: _____ _____
Authorized Representative, Title Date

HIGHER EDUCATION COORDINATING COMMISSION

By: _____ _____
Ben Cannon, Executive Director Date

HECC – Review for procurement sufficiency

Reviewed by: _____ _____
Derek Dizney, Procurement Manager Date

DOJ – Review for legal sufficiency – _____.

EXHIBIT A
STATEMENT OF WORK

A. GENERAL INFORMATION

To Be Filled In

B. REQUIRED SERVICES, DELIVERABLES, AND DELIVERY SCHEDULE

To Be Filled In

C. BUDGET

To Be Filled In

D. KEY PERSONS

Contractors' Key Persons under this contract include the following:

To Be Filled In

EXHIBIT B
REQUIRED INSURANCE

INSURANCE REQUIREMENTS

Contractor shall obtain, at Contractor's expense, the insurance specified in this Exhibit B prior to performing under this Contract and shall maintain it in full force and at its own expense throughout the duration of this Contract, as required by any extended reporting period or tail coverage requirements, and all warranty periods that apply. Contractor shall obtain the following insurance from insurance companies or entities that are authorized to transact the business of insurance and issue coverage in the State of Oregon ("State") and that are acceptable to HECC. Coverage shall be primary and non-contributory with any other insurance and self-insurance, with the exception of Professional Liability and Workers' Compensation. Contractor shall pay for all deductibles, self-insured retention and self-insurance, if any.

WORKERS' COMPENSATION & EMPLOYERS' LIABILITY
All employers, including Contractor, that employ subject workers, as defined in ORS 656.027, shall comply with ORS 656.017 and provide workers' compensation insurance coverage for those workers, unless they meet the requirement for an exemption under ORS 656.126(2). Contractor shall require and ensure that each of its subcontractors complies with these requirements. If Contractor is a subject employer, as defined in ORS 656.023, Contractor shall also obtain employers' liability insurance coverage with limits not less than $500,000 each accident. If Contractor is an employer subject to any other state's workers' compensation law, Contactor shall provide workers' compensation insurance coverage for its employees as required by applicable workers' compensation laws including employers' liability insurance coverage with limits not less than $500,000 and shall require and ensure that each of its out-of-state subcontractors complies with these requirements.

COMMERCIAL GENERAL LIABILITY:
☒ **Required** ☐ **Not required**

Commercial General Liability Insurance covering bodily injury and property damage in a form and with coverage that are satisfactory to the State. This insurance shall include personal and advertising injury liability, products and completed operations, contractual liability coverage for the indemnity provided under this Contract, and have no limitation of coverage to designated premises, project or operation. Coverage shall be written on an occurrence basis in an amount of not less than $1,000,000 per occurrence. Annual aggregate limit shall not be less than $2,000,000.

AUTOMOBILE LIABILITY INSURANCE:
☒ **Required** ☐ **Not required**

Automobile Liability Insurance covering Contractor's business use including coverage for all owned, non-owned, or hired vehicles with a combined single limit of not less than $1,000,000 for bodily injury and property damage. This coverage may be written in combination with the Commercial General Liability Insurance (with separate limits for Commercial General Liability and Automobile Liability). Use of personal automobile liability insurance coverage may be acceptable if evidence that the policy includes a business use endorsement is provided.

PHYSICAL ABUSE AND SEXUAL MOLESTATION LIABILITY:
☐ **Required** ☒ **Not required**

Abuse and Molestation Insurance in a form and with coverage that are satisfactory to HECC covering damages arising out of actual, perceived, or threatened physical abuse, mental injury, sexual molestation, negligent: hiring, employment, supervision, training, investigation, reporting to proper authorities, and retention of any person for whom the Contractor is responsible including but not limited to Contractor and Contractor's employees and volunteers. Policy endorsement's definition of an insured shall include the Contractor, and the Contractor's employees and volunteers. Coverage shall be written on an occurrence basis in an amount of not less than $1,000,000 per occurrence. Any annual aggregate limit shall not be less than $3,000,000. Coverage can be provided by a separate policy or as an endorsement to the commercial general liability or professional liability policies. These limits shall be exclusive to this required coverage. Incidents related to or arising out of physical abuse, mental injury, or sexual molestation, whether committed by one or more individuals, and irrespective of

the number of incidents or injuries or the time period or area over which the incidents or injuries occur, shall be treated as a separate occurrence for each victim. Coverage shall include the cost of defense and the cost of defense shall be provided outside the coverage limit.

PROFESSIONAL LIABILITY:
☒ **Required** ☐ **Not required**

Professional Liability Insurance covering any damages caused by an error, omission or any negligent acts related to the services to be provided under this Contract by the Contractor and Contractor's subcontractors, agents, officers or employees in an amount not less than $1,000,000 per occurrence. Annual aggregate limit shall not be less than $2,000,000. If coverage is on a claims made basis, then either an extended reporting period of not less than 24 months shall be included in the Professional Liability Insurance coverage, or the Contractor shall provide Tail Coverage as stated below.

EXCESS/UMBRELLA INSURANCE:
A combination of primary and excess/ umbrella insurance may be used to meet the required limits of insurance.

ADDITIONAL INSURED:
The Commercial General Liability insurance and Automobile liability insurance required under this Contract must include an additional insured endorsement specifying the State of Oregon, its officers, employees and agents as Additional Insureds, including additional insured status with respect to liability arising out of ongoing operations and completed operations, but only with respect to Contractor's activities to be performed under this Contract. Coverage shall be primary and non-contributory with any other insurance and self-insurance. The Additional Insured endorsement with respect to liability arising out of your ongoing operations must be on ISO Form CG 20 10 07 04 or equivalent and the Additional Insured endorsement with respect to completed operations must be on ISO form CG 20 37 04 13 or equivalent.

TAIL COVERAGE:
If any of the required insurance is on a claims made basis and does not include an extended reporting period of at least 24 months, Contractor shall maintain either tail coverage or continuous claims made liability coverage, provided the effective date of the continuous claims made coverage is on or before the effective date of this Contract, for a minimum of 24 months following the later of (i) Contractor's completion and HECC's acceptance of all Services required under this Contract, or, (ii) HECC or Contractor termination of Contract, or, iii) The expiration of all warranty periods provided under this Contract.

CERTIFICATE(S) AND PROOF OF INSURANCE:
Contractor shall provide to HECC Certificate(s) of Insurance for all required insurance before delivering any Goods and performing any Services required under this Contract. The Certificate(s) shall list the State of Oregon, its officers, employees and agents as a Certificate holder and as an endorsed Additional Insured. If excess/ umbrella insurance is used to meet the minimum insurance requirement, the Certificate of Insurance must include a list of all policies that fall under the excess/ umbrella insurance. As proof of insurance HECC has the right to request copies of insurance policies and endorsements relating to the insurance requirements in this Contract.

NOTICE OF CHANGE OR CANCELLATION:
The Contractor or its insurer must provide at least 30 days' written notice to HECC before cancellation of, material change to, potential exhaustion of aggregate limits of, or non-renewal of the required insurance coverage(s).

INSURANCE REQUIREMENT REVIEW:
Contractor agrees to periodic review of insurance requirements by HECC under this Contract and to provide updated requirements as mutually agreed upon by Contractor and HECC.

STATE ACCEPTANCE:
All insurance providers are subject to HECC acceptance. If requested by HECC, Contractor shall provide complete copies of insurance policies, endorsements, self-insurance documents and related insurance documents to HECC's representatives responsible for verification of the insurance coverages required under this Exhibit B.

EXHIBIT C
HOUSE BILL 4124

SEE ATTACHED

Enrolled
House Bill 4124

Sponsored by Representative MARSH, Senators WAGNER, PATTERSON, Representatives ANDERSEN, EVANS, FRAGALA, MCDONALD, RIEKE SMITH, Senators BROADMAN, GOLDEN, SOLLMAN; Representatives BOWMAN, HARBICK, LEVY B, NOSSE, SOSA, WALLAN, WALTERS, WATANABE, WISE, Senators FREDERICK, MANNING JR, NASH, WEBER (Presession filed.)

CHAPTER .....

AN ACT

Relating to the state post-secondary education system; and declaring an emergency.

Whereas about a decade ago Oregon established a statewide system of independent universities and the Higher Education Coordinating Commission; and

Whereas Oregon's post-secondary education institutions have unique missions and should serve distinct populations; and

Whereas Oregon's system of independent boards at public universities and community colleges provides essential oversight and direction to the mission and operation of these institutions of higher education; and

Whereas market competition among Oregon's post-secondary education institutions has eroded cross-institutional collaboration, impaired focus on regional and state needs and undermined public confidence in the system as a vital source of economic development and employment opportunities; and

Whereas after about a decade of operations, Oregon must reevaluate the accessibility, financial resiliency, efficiency, effectiveness and coordination of its post-secondary education system to ensure the system meets the diverse needs of Oregon's students, economy and workforce; and

Whereas recent, current and projected demographic, enrollment and market conditions and trends coupled with the competitive landscape for post-secondary education institutions, including the effects of online and out-of-state programs, require Oregon institutions to strategically assess financial and enrollment sustainability; and

Whereas Oregon's community colleges are locally governed with taxing authority and fiscal responsibilities, so any statewide study, review, evaluation or recommendation regarding the structure, coordination, funding or governance of post-secondary education institutions must recognize and account for the distinct governance structure of community colleges; and

Whereas Oregon's public universities and community colleges are cornerstones of our communities and engines of economic growth and should be aligned to meet regional and state economic needs; now, therefore,

Be It Enacted by the People of the State of Oregon:

SECTION 1. (1) The Higher Education Coordinating Commission shall conduct a study of the condition of Oregon's post-secondary education system and develop detailed recom-

mendations for the design, implementation and operation of a viable and superior institutional framework that:

(a) Supports access to post-secondary education institutions for students across geographic location, including rural communities and other underserved populations;

(b) Fuels regional and statewide economic development and employment opportunities; and

(c) Improves the financial viability of each post-secondary education institution in Oregon and the post-secondary education system as a whole, including by addressing projected enrollment, increased personnel costs, changes in federal law or priorities, sector-specific inflationary costs or other related factors.

(2) The study must evaluate and make recommendations on each of the following subjects:

(a) The distinct objectives and missions of each category of post-secondary education institution, including community college, public university, regional university and research university, in consideration of key variables such as research, public services, instruction, academic programming, educational model and the student population served; and

(b) Opportunities for collaboration, restructuring or integration in the post-secondary education system.

(3) The study may evaluate and make recommendations on each of the following subjects:

(a) Development of academic programs and specialties to support current and emerging regional and state economic development and workforce needs;

(b) Criteria for the review of unnecessary program duplication across post-secondary education institutions and unmet program needs statewide;

(c) Structures and supports to connect students and graduates to employers and employment opportunities;

(d) Funding strategies, including strategies to foster collaboration, restructuring or integration in the post-secondary education system; and

(e) Metrics of affordability for students and financial health for post-secondary education institutions.

(4) In developing recommendations under this section, the commission shall engage the expertise of and consult public institutions of higher education, including faculty, staff and students, and any other interested stakeholders identified by the commission.

(5) The commission shall submit a preliminary and final report on the results of the study, in the manner provided under ORS 192.245, along with any recommended legislative changes, to the interim or regular committees of the Legislative Assembly related to higher education no later than:

(a) October 1, 2026, for the preliminary report.

(b) April 1, 2027, for the final report.

(6) The commission may utilize third-party contractors to carry out all or part of this section.

SECTION 2. This 2026 Act being necessary for the immediate preservation of the public peace, health and safety, an emergency is declared to exist, and this 2026 Act takes effect on its passage.

Passed by House February 27, 2026

.....
Timothy G. Sekerak, Chief Clerk of House

.....
Julie Fahey, Speaker of House

Passed by Senate March 4, 2026

.....
Rob Wagner, President of Senate

Received by Governor:

.....M.,....., 2026

Approved:

.....M.,....., 2026

.....
Tina Kotek, Governor

Filed in Office of Secretary of State:

.....M.,....., 2026

.....
Tobias Read, Secretary of State

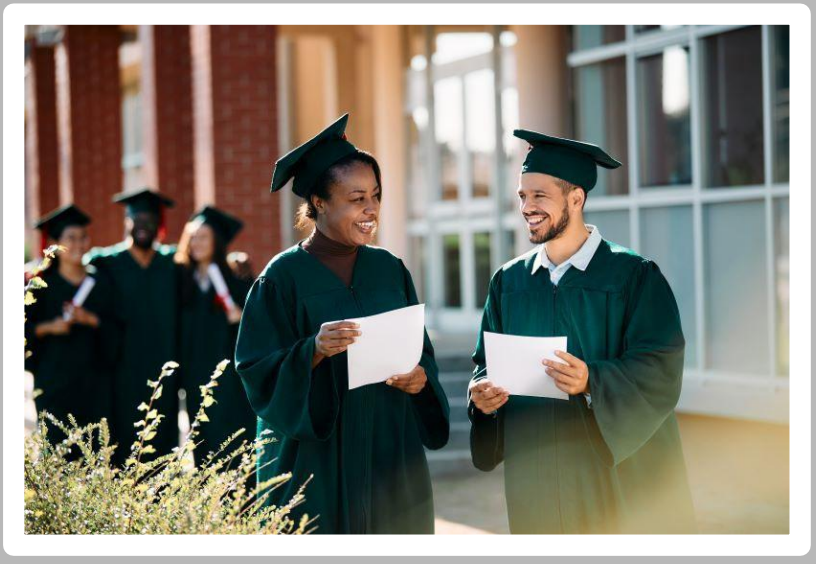
EXBHIT D
SPENDING AND EFFICIENCY IN OREGON PUBLIC UNIVERSITIES

SEE ATTACHED

HIGHER EDUCATION COORDINATING COMMISSION

SPENDING AND EFFICIENCY IN OREGON PUBLIC UNIVERSITIES

JANUARY 2026



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Accessibility Statement
The HECC is committed to accessible services for all. Requests for translations, language services, alternative formats, or Americans with Disabilities Act (ADA) accommodations may be sent to info.hecc@hecc.oregon.gov.

Purpose of the Report

This report contains information about spending at Oregon's public universities and considers cost efficiency in response to a budget note included within the HECC's 2025-27 biennium budget bill (SB 5525, 2025 RS). The full text of the budget note and a collaborative timeline are included in the appendix. Additional financial information can be found in a report titled *Financial Sustainability of Oregon Public Universities, 2025* as presented to the HECC Funding and Achievement Subcommittee in June 2025 and posted on the HECC website.

The budget note directs the HECC to assess spending and cost efficiency at Oregon's public universities using common metrics and currently available data. The report is to include student to faculty and student to staff ratios, revenue and expenditure data, academic program growth and contractions, enrollment data, and completion data. The report shall identify and validate:

1. Factors contributing to changes in academic, research, student support, administrative, and facility costs.
2. Factors contributing to changes in revenue levels and composition.
3. Current and projected institutional debt and debt service.
4. Federal, state, and local regulations that can lead to financial strain.

The budget note also suggests the HECC may review and report on other issues related to preserving the integrity of the student experience while ensuring financial sustainability. The HECC is directed to report findings to the legislature during the 2026 session. The note says the report may include recommendations for coordinated and collaborative efforts to reduce institutional costs and students' cost of attendance.

Data and Analysis

The data in this report comes from publicly available sources including, but not limited to, the U.S. Department of Education's Integrated Postsecondary Education and Data System (IPEDS), the HECC Office of Research and Data, the HECC Office of Postsecondary Finance and Capital, and annual audited financial reports posted on the universities' websites. All sources are noted as appropriate. The general timeframe for analysis is the past decade; however, the period in each table is based on the availability of data which means the same period is not used consistently throughout the report.

Many of the data tables include an annual growth rate metric. The calculation used is for a *compound* annual growth rate (CAGR) which smooths the volatility associated with year-to-year variances over time. The calculation is defined as:

$$CAGR = (V_n/V_0) \text{ ^ } (1/ \text{ Number of years}) - 1$$

Where V_n is the end value of the last year and V_0 is the initial value of the first year. The difference between them, in years, is used in the calculation. For example, considering the undergraduate, resident tuition and mandatory fees for EOU in Table 6 on page 11, the calculation is as follows:

($10,709 / $7,449) ^ (1/9) – 1 = **4.1%**

For some of the tables, the beginning of the period noted is during the transition from the Oregon University System (OUS) to institutional governing boards. During the transition, some of the services provided by the Chancellor's Office transitioned to the universities while some transitioned to the University Shared Services Enterprise (USSE) or were eliminated. More information about USSE can be found later in this report. The reader should note this may impact the analysis.

With a few exceptions, financial data used in this report is not adjusted for inflation or regional cost of living variances. Rather, the annual growth rate over time for nominal data is compared to the annual growth rate of inflation. The inflation rate used for comparison is the consumer price index for urban consumers (CPI-U) for the western region of the United States available from the U.S. Bureau of Labor Statistics.

It should be noted for the reader's benefit that cost growth experienced by the universities has historically exceeded that of consumer-based inflation and that consumer-based inflation in the western region of the U.S. has historically exceeded that of the national average. With those caveats, national comparisons are included with the intent to provide context. A more detailed discussion of inflation can be found in the appendix.

Although university specific data are included, the analysis in this report is intended to communicate aggregated findings. As such, the reader should be cautioned against using much of this information to compare the performance of one university to another. This is because the universities face varied circumstances, due to funding sources, enrollment trends, program offerings, and infrastructure needs, that impact resource allocation decisions. Additional context by university can be found starting on page 39.

The latest date for which data in this report is included is FY2024. As a result, the report does not reflect the current financial condition of the public universities. Information about recent budget actions is included on pages 31 and 32. Collectively for FY2026, the universities report having planned cuts of $85.1 million and staffing reductions of 180 filled positions with 540 total positions closed. Also, recent forecasts suggest the state's economic outlook has changed with the state budget in a deficit.

Acknowledgement

This work is influenced by a report titled *Spending and Efficiency in Higher Education*, published by the Joint Legislative Audit and Review Commission for the Commonwealth of Virginia dated October 2024. A complete list of works cited is included in this report.

Key Findings

Cost efficiency is important for public higher education given the financial impact on students and their families. Public university cost efficiency can be viewed through both student and institution spending. Data included in this report finds that:

- Tuition rates have increased, and Oregon relies more than its peers nationally on tuition revenue. However, efforts by the universities and the state, including investments in financial aid, have kept the average net price (i.e., what students actually paid) from outpacing inflation over the past decade for students who receive financial aid. The trend for students who do not receive financial aid might differ.

- The overall growth in spending has exceeded that of consumer-based inflation. This is consistent with the national experience for higher education institutions and other public, labor-intensive entities in Oregon. This can be attributed to the rising cost of wages and benefits, specifically pension contributions. This can also be attributed to growth in other costs, some of which include insurance, compliance, technology, and additional student support costs.

- The growth in spending on institution support (i.e., accounting, procurement, legal, IT, etc.) is an outlier. Proportionally, spending on instruction and research has fallen from 43% to 37% while spending on public service and institution support has grown from 14% to 19%. The growth in operating costs per FTE exceeded inflation in part due to enrollment declines.

- Over the past decade, staffing has grown while enrollment has declined with significant variation by university. Staffing grew the most in academic and student support areas while also growing in institution support areas as well.

- When considering cost efficiency, the number of degree/certificate programs offered has grown significantly while *student to staff* and *student to faculty* ratios have declined. Degree productivity (i.e., the number of completions per 1,000 student FTE) and degree completion spending (i.e., the number of completions per $100,000 in spending) have both increased, suggesting improved efficiency.

Oregon public universities face the potential for limited enrollment growth due to forecasted demographic challenges, structural budget deficits, and increased public skepticism of value. As a result, public universities will have to look at optimizing operations. In a resource-constrained environment, efficiency is imperative.[1] These pressures will necessitate board leadership and community engagement to align operations and available resources with current and emerging realities to achieve long-term financial sustainability.

[1] Daniel Greenstein, *Facing the Future: How Higher Education Institutions Can Thrive Under a New Federal Compact*, Baker Tilly, July 4, 2025.

Implications and Recommendations

The findings in this report, combined with the demographic challenges facing higher education over the next couple decades and the state's constrained fiscal environment, strongly suggest that bold action is necessary to guarantee the ongoing vitality of Oregon's public universities. A detailed discussion of recommendations starts on page 35.

The recommendations focus on actions that substantially alter the structure for the delivery of public university services, including academic and administrative programs. The focus is on gaining economies of scale by increasing the "systemness" of the universities[2], as an opportunity to exploit the scale of the collective system as a competitive advantage.[3]

Many of the activities envisioned here will be time-consuming and, potentially, costly at the outset. A sustained legislative and Gubernatorial vision and commitment will be required to see this work through to the point where it could generate substantial savings while bolstering the value and vitality of all of Oregon's public universities.

The recommendations include:

1. The Legislature should direct HECC to work with all of Oregon's public higher education institutions, including community colleges, to develop a proposal, or proposals, for targeted institutional integration by January 2027.

2. The Legislature should require academic degree programs at public universities to be periodically reviewed and renewed by HECC.

3. The Legislature should consider appropriating a separate salary pool to support essential compensation increases for university employees.

4. In setting priorities for state higher education capital investments, the HECC and the Legislature should put a greater emphasis on the replacement of IT infrastructure.

5. The Legislature should continue funding targeted sustainability efforts at Oregon public universities.

[2] ORS 352.025(2): "The Legislative Assembly also finds that: (a) even with universities with governing boards, there are economy-of-scale benefits to having a coordinated university system; and (b) even with universities with governing boards, shared services may continue to be shared among universities."

[3] Deloitte Insights, 2025 Higher Education Trends, A look at the challenges and opportunities shaping America's higher education sector. Deloitte Center for Government Insights. April 2025.

Introduction

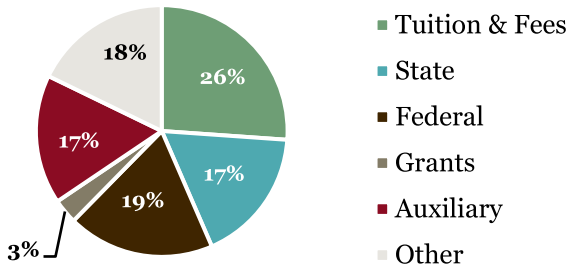
Oregon has a decentralized public four-year higher education system.
Oregon's seven public universities vary in size, scope, and mission. Together, they educate 123,984 students, approximately 80 percent of whom are undergraduates.[4] Overall, the seven universities will receive $2.4 billion in state appropriated funding for institution support, debt service, and capital construction during the 2025-27 biennium.[5]

The public universities in Oregon are not state agencies. Oregon Revised Statute (ORS) 352.033 notes they are governmental entities. Further, they are described as "independent public bodies legally separate from the state" in the state's comprehensive annual financial report. They are complex organizations with housing, dining, healthcare, and retail operations responsible for over eighteen million square feet of space in over 800 buildings serving all 36 Oregon counties.

Each university has an independent governing board with members appointed by the Governor. The board has the ultimate authority over institutional operations including the viability, sufficiency, and sustainability of the institution across all funding sources. The Oregon Higher Education Coordinating Commission (HECC) serves as a State of Oregon agency that coordinates funding and policy while convening partners across the public and private higher education and workforce landscape. A list of the HECC's powers, duties, and functions can be found in ORS 350.075.

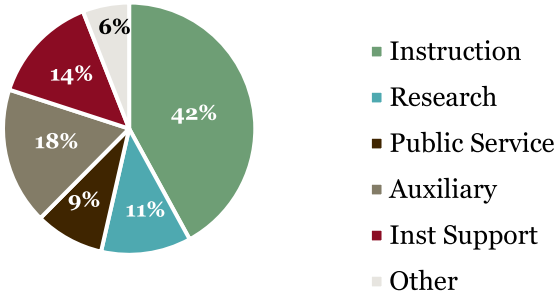
The public universities collect almost $4.3 billion annually in revenue and employ more than 21,000 staff.[6]
To operate, the universities rely primarily on revenue collected from students (e.g., tuition and fees) and on state appropriations through the public university support fund (PUSF) as shown in Figure 1. Across all funds, both sources make up 43% of total revenue. The federal government is also an important funding partner for financial aid and targeted research making up 19% of total revenue.

Figure 1: FY2024 Sources of Funding



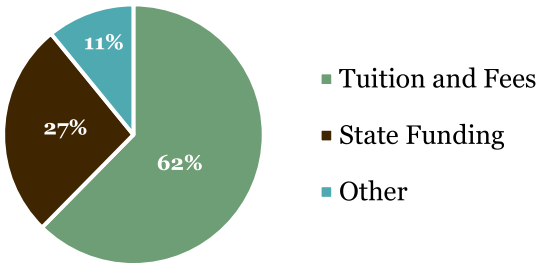
[4] Public University Data Dashboard, HECC Office of Research and Data, 2023-24 academic year, all residencies, all student types. Undergraduate includes high school students.
[5] State Funding and Formula Summary Report for the 2025-27 biennium, HECC Office of Postsecondary Finance and Capital. Table 2, page 4.
[6] Financial data is from the universities' annual financial reports. Staffing is from the November 2024 Higher Education Employees Annual Report for 2022.

Figure 2: FY2024 Uses of Funding



Institutional revenue funds a variety of instruction, research, and other functions. About two-thirds of revenue is used for academic and related spending which includes instruction, student support, research, and public service. Spending on auxiliary programs, which includes housing, dining, and athletics, accounts for 17 percent of total spending. The remainder is spent on institutional support and other functions as shown in Figure 2. Education and general (E&G) financial data is reported by the universities to the HECC Office of Postsecondary Finance & Capital annually via survey.

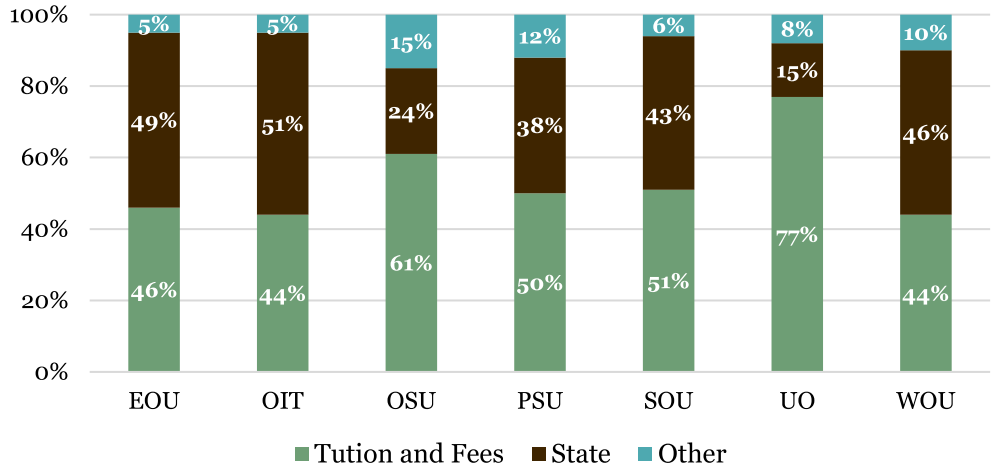
Figure 3: E&G Revenue, FY2024



Focusing solely on the E&G (or general) fund, for all seven universities, tuition and fee revenue makes up the majority as shown in Figure 3. This ratio is effectively reversed from previous generations during which state funding made up a larger share of E&G revenue, which impacts student affordability.

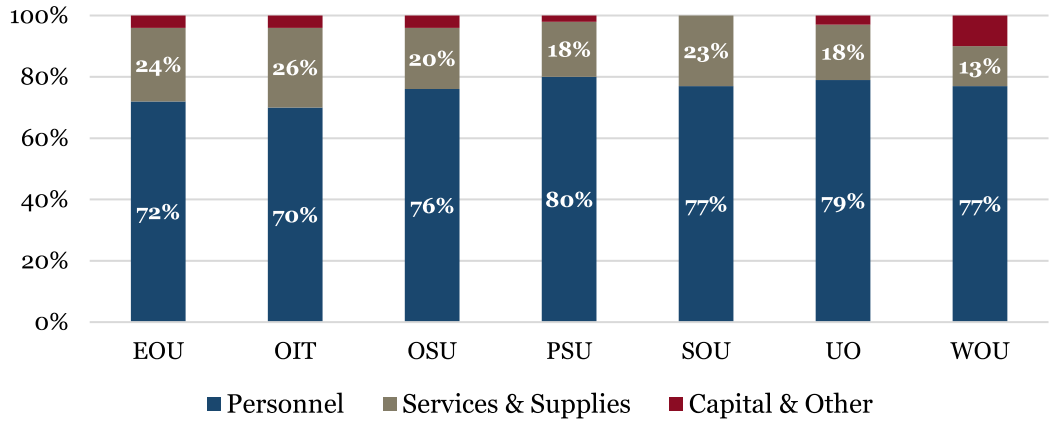
Specific revenue sources, as a proportion of total revenue, vary by university. The technical and regional universities are more dependent on state revenue as shown in Figure 4.

Figure 4: FY2024 E&G Revenue by University



Spending varies greatly by university and generally aligns with enrollment and mission. Since instruction, research, academic support, and student services are all labor-intensive activities, the largest expense by natural classification is for wages and benefits which make up about 70-80% of E&G spending as shown in Figure 5. The universities employed 21,119 faculty and staff during the fall of academic year 2022-23.[7] Some benefit expenses are outside the control of the university boards like pension contributions paid to Oregon PERS.

Figure 5: FY2024 E&G Expenses by University



Cost efficiency is a key tenet for public higher education given the costs to students and their families as well as the substantial amount of state funding involved. Higher education spending directly affects the cost to students through the amount charged for tuition and fees. This can affect students, their families, and society more broadly in the long-term especially for those who finance their education with debt. Additionally, the state's significant investment in public postsecondary education makes cost efficiency important.

[7] ORS 350.360 Annual Report on Higher Education Employees, November 2024.

Attentiveness to cost efficiency is also timely given declining student enrollment and other emerging trends. Overall, for the public universities, FTE enrollment is down 5% over the past decade, varying significantly by university.[8] Also, forecasted demographic challenges[9], uncertainty regarding long-term student demand[10], and potentially constrained state funding support all contribute to expected fiscal challenges.[11]

As noted in a recent study of Oregon higher education, the universities will have to increase the efficiency with which they provide educational services.[12] In another report, specifically for the technical/regional universities, it was noted the universities will not be able to grow their way to success by simply expanding their role and scope to attract more students. Although, it was also noted that improving retention can help significantly. The report concluded the universities will need to adapt to revenue uncertainty by managing costs and improving efficiencies over time.[13]

This report focuses on cost efficiency rather than academic quality and other priorities such as community and civic contributions. For public universities, achieving cost efficiencies (i.e., more outcomes for the same or less cost) can be complicated by the need to compete for faculty, staff, and students. Successfully competing often requires universities to increase spending on faculty and staff salaries to sustain academic quality, provide robust student support services, and improve campus amenities.

Some efforts to improve quality and address completion gaps, like increasing instructional staffing levels or enhancing student support, can reduce cost efficiency as measured by this report, but can contribute to student success. Similarly, some efforts to improve cost efficiency can negatively impact quality.[14] Furthermore, cost efficiency assessments reported within this report do not include an evaluation of the extensive long-term benefits of postsecondary education which include higher income levels of college graduates over their lifetime; research, knowledge, and innovation growth; workforce pathways that support Oregon's economic needs; and civic and cultural contributions to communities.

This report assesses spending and cost efficiency as requested by the Legislature. To do so, it includes three sections of analysis: student costs, university spending and staffing, and cost efficiency. The report also includes detailed recommendations for further consideration.

[8] Public University Data Dashboard, HECC Office of Research and Data. Statewide, all residencies, all student types.
[9] Financial Sustainability of Oregon Public Universities, HECC Office of Postsecondary Finance & Capital, 2025, p 17.
[10] Ibid, p 18.
[11] Ibid, p 20.
[12] Oregon Higher Education Landscape Study, National Center for Higher Education Management Systems (NCHEMS), September 2022.
[13] TRU+ PSU Financial Sustainability Funding: Analysis and Allocation Process, NCHEMS, January 2024.
[14] Spending and Efficiency in Higher Education, Joint Legislative Audit and Review Commission, Commonwealth of Virginia, October 2024.

Student Costs

The published price for tuition and fees has grown faster than inflation over the past decade while the total cost of attendance has not.
Universities charge tuition and related fees for students to attend, which is a large portion of the total cost of attendance. Rates can vary based on several factors including a student's academic year (or cohort), the number of credit hours, declared major, status (i.e., undergraduate or graduate), and residency. The governing boards have authority to set tuition and fee rates. Tuition and fee setting is complex with ORS 352.103 laying out requirements for an annual process at each university which requires staff and student participation.

Table 6 shows undergraduate, resident tuition and mandatory fees by university for the past decade, unadjusted for inflation. This is for full-time, entering students taking 45 credits over three terms in a given academic year. All incidental mandatory fees are included. The information is for the main campus only and for the entering (or freshman) student cohort as applicable. Differential tuition and course fees are not included. The average annual increase across all Oregon public universities over this period was 4.5%, compared to inflation of 3.3%.

The data for Table 6 is collected from the universities annually and calculated by HECC staff. National average data is from the College Board's Trends in College Pricing reports. Specifically, table 1A in the 2014 report and table CP-1 in the 2024 report. It should be noted that the University of Oregon transitioned to a guaranteed tuition program in academic year 2020-21 under which tuition and certain mandatory fees are locked for undergraduate students for five years from matriculation.

Table 6: Undergraduate, Resident Tuition and Mandatory Fees

University	Academic Year 2014-15	Academic Year 2023-24	Number Variance	Percent Variance	Annual Growth Rate
EOU	7,449	10,709	3,260	44%	4.1%
OIT	8,460	12,687	4,227	50%	4.6%
OSU	9,122	13,809	4,687	51%	4.7%
PSU	7,794	11,238	3,444	44%	4.1%
SOU	7,720	12,093	4,373	57%	5.1%
UO	9,918	15,667	5,749	58%	5.2%
WOU	8,277	11,025	2,748	33%	3.2%
Average	**$8,391**	**$12,461**	**$4,070**	**48%**	**4.5%**
National Avg	9,139	11,310	2,171	24%	2.4%

Universities establish a total cost of attendance, or sticker price, which includes tuition and fees, books and supplies, room and board, and personal expenses. Table 7 shows the change in the total cost of attendance for full-time students over the past decade unadjusted for inflation. This

data comes from the institutional reports of standard student budgets based on enrollment of 15 credits per term regardless of demographic breakout as reported in the Public Universities Data Dashboard. National average data is from the College Board's Trends in College Pricing reports, specifically figure 1 in the 2013 report and figure CP-1 in the 2022 report. The average annual increase across all Oregon public universities from 2013-14 to 2022-23 was 3.1%, compared to inflation of 3.2%.

Table 7: Total Cost of Attendance

University	Academic Year 2013-14	Academic Year 2022-23	Number Variance	Percent Variance	Annual Growth Rate
EOU	21,090	25,623	4,533	21%	2.2%
OIT	20,811	33,298	12,487	60%	5.4%
OSU	23,658	30,870	7,212	30%	3.0%
PSU	24,321	29,187	4,866	20%	2.0%
SOU	22,848	31,008	8,160	36%	3.5%
UO	23,965	33,639	9,674	40%	3.8%
WOU	21,981	25,158	3,177	14%	1.5%
Average	**$22,668**	**$29,826**	**$7,158**	**32%**	**3.1%**
National Avg	22,826	27,940	5,114	22%	2.3%

Tuition and fees along with room and board comprise the largest share of the cost of attendance. This share has grown over time with tuition and fees having grown the fastest. During academic year 2013-14, tuition and fees with room and board made up 76% of the average cost of attendance. A decade later, during 2022-23, it was 85%. Tuition and fees alone have grown from 31% to 36% of the total cost of attendance. Tuition and fees have grown the fastest, followed by room and board, as a share of all costs.[15]

The average net price (i.e., what students actually paid) has grown slightly less than inflation over the past decade with the published cost of attendance reduced for those receiving financial aid by an average of 40 percent.

For some students, the total cost of attendance may be partially offset by financial aid including institution remissions and waivers. As a result, most students pay less than the sticker price. The average net price is the total cost of attendance minus financial aid, but only for students awarded financial aid.

[15] Presentation to the HECC, August 8, 2024, Docket item 7.2a, Dr. Amy G. Cox, Understanding the Drivers of College and University Affordability, slide 11.

Table 8 shows the change in the average net price for admitted undergraduates who are Oregon residents and filed a complete FAFSA/ORSAA. This is the cost of attendance after subtracting public aid (i.e., Pell grants and OOG) and institution aid unadjusted for inflation. National average data is from the College Board's Trends in College Pricing reports, specifically figure 10 in the 2013 report and figure CP-9 in the 2022 report. The average annual increase across all Oregon public universities over this period was 2.9%, compared to inflation of 3.2%.

An estimated 26% of students during 2022-23 did not apply for financial aid while 32% did not receive financial aid. This means a fair number of students do not receive need-based aid and experience the full impact of tuition and fee increases. As a result, that may impact the calculation of the average in this metric.

Table 8: Average Net Price

University	Academic Year 2013-14	Academic Year 2022-23	Number Variance	Percent Variance	Annual Growth Rate
EOU	10,699	13,365	2,666	25%	2.5%
OIT	12,995	20,940	7,945	61%	5.4%
OSU	15,491	19,785	4,294	28%	2.8%
PSU	13,406	15,401	1,995	15%	1.6%
SOU	12,842	18,006	5,164	40%	3.8%
UO	16,270	22,864	6,594	41%	3.9%
WOU	13,723	14,278	555	4%	0.4%
Statewide	**$14,360**	**$18,564**	**$4,204**	**29%**	**2.9%**
National Avg	12,620	19,250	6,630	53%	4.8%

The average discount is calculated by dividing the difference between the net price in Table 8 and the total cost of attendance in Table 7 by the total cost of attendance. This shows students at Oregon public universities paid an average of 40 percent less than the published total cost of attendance. This is largely unchanged over the past decade and compares to an average discount of 31 percent nationally.[16]

Table 8a is a companion to Table 8 and provides a look at the average net price *by family income* for full-time, first-time undergraduate students awarded financial aid from grants/scholarships funded by federal, state, local, and/or institutional resources unadjusted for inflation. This includes all Title IV federal student aid including federal student loans. This data comes from the U.S. Department of Education IPEDS survey. The data shows that during academic year 2022-23, students who receive financial aid, and come from families in the lowest income bracket, paid just over $13,200 that year to attend an Oregon public university.

[16] Trends in College Pricing and Student Aid, 2022, figure CP-9, p 18. Net COA compared to published COA.

Table 8a: Average Net Price by Family Income

Income Group	Average Net Price (2022-23)	Compared to Global Average
$0 – $30,000	$13,242	(26%)
$30,001 – $48,000	$14,102	(21%)
$48,001 – $75,000	$16,066	(10%)
$75,001 – $110,000	$20,398	14%
$110,001+	$23,174	29%

Overall, student affordability has improved over time due to additional investments in both state and institution financial aid programs.
The affordability rate, defined as the percentage of students whose expected costs are greater than their expected resources, has declined from 64% during 2013-14 to 50% during 2022-23 as shown in Table 9. This data comes from the Public Universities Data Dashboard. A more robust discussion focusing on this metric is addressed in other HECC publications.[17]

Table 9: Affordability Rate

University	Academic Year 2013-14	Academic Year 2022-23	Variance
EOU	57%	32%	(25%)
OIT	60%	54%	(6%)
OSU	63%	48%	(15%)
PSU	69%	57%	(12%)
SOU	65%	51%	(14%)
UO	60%	50%	(10%)
WOU	61%	35%	(26%)
Average	**64%**	**50%**	**(14%)**

From FY2014 to FY2025, the total amount for institution remissions has grown from $114M to $247M for an average annual increase of 10%,[18] while funding distributed to the public universities for the Oregon Opportunity Grant (OOG) has grown on average 14% per year over the past decade.[19] Both of which have helped improve student affordability.

[17] Research Brief: Recent Improvements in College and University Affordability, HECC Office of Research and Data, Summer 2023.
[18] Fall E&G funding survey data collected by HECC Office of Postsecondary Finance and Capital, FY2024.
[19] Oregon Opportunity Grant disbursements by sector, data provided by HECC Office of Student Access and Completion, October 2023.

State funding has grown in the recent past but trails the national average and regional peers as shown in Tables 10 and 10a with Oregon public universities now more tuition dependent. This explains why tuition and fee charges are higher in Oregon. This data comes from the 2024 State Higher Education Finance Survey (SHEF), tables 3.2A, 3.3A, and 4.3A. Funding per FTE is adjusted for inflation to current dollars and includes support funds, state programs, and state financial aid funding. State appropriations for research, capital, and debt service are all excluded because the data is from a national survey that accounts for state-specific policy choices.

Table 10: Higher Education Funding and the Student Share of Cost

Year	U.S. Funding per FTE	Oregon Funding per FTE	Variance Funding per FTE	U.S. Net Tuition as % of Total Revenue	Oregon Net Tuition as % of Total Revenue
2019	$9,490	$5,368	(43%)	55.1%	71.7%
2023	$10,625	$6,706	(37%)	50.6%	68.2%
2024	$10,820	$6,200	(43%)	49.5%	69.7%
Variance, 2019 to 2024	**14%**	**15%**	**N/A**	**(5.6%)**	**(2.0%)**

Table 10a: Regional Data, FY2024

	Funding per FTE	Financial Aid per FTE	Net Tuition as % of Total Revenue
California	11,344	1,831	33.7%
Idaho	10,351	449	51.9%
Nevada	11,500	2,220	23.6%
Washington	13,268	2,608	48.1%
Regional Average	**$11,616**	**$1,777**	**39.3%**
Oregon	6,200	1,146	69.7%
OR vs Average	**(47%)**	**(36%)**	**N/A**

University Spending and Staffing

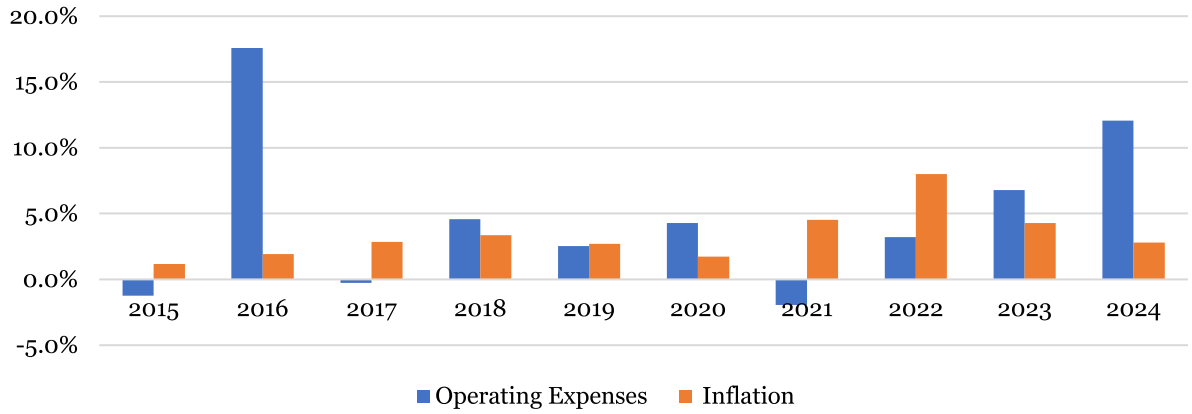
An important indicator of cost efficiency is how institutional spending has changed over time. Spending that grows faster than inflation can result from operational inefficiencies. Considering trends among different functions of spending is useful analysis as well. Growth in mission-critical functions (i.e., education and related) may lead to increased inefficiency; on the other hand, doing so may be necessary to align with strategic intent if focused on improving academic quality or reducing access and completion barriers.

Another related indicator of cost efficiency is how institutional spending per student has changed over time. Often during periods of enrollment growth, spending increases overall but declines on a per student basis implying either a reduced level of quality or improved cost efficiency through economies of scale. During periods of enrollment decline, if spending is not reduced, which can be difficult given fixed costs related to facilities and tenured faculty, spending per student often increases faster than inflation.[20]

Changes over time in staffing levels and spending on staffing are also efficiency indicators. Growth in staff positions that are indirectly related to the core mission may lead to cost inefficiency. Alternatively, fewer staff in certain positions may represent efficiency gained.[21]

The growth in operating spending has exceeded inflation, is on par with other labor-intensive public entities, and is comparable to the national experience.
In the past decade, from FY2015 through FY2024, the total growth in operating expenses for the public universities was 59%. The average annual growth in spending was 5.3% compared to inflation of 3.6% with the annual change for each noted in Figure 11. For context, other public entities in Oregon (i.e., State of Oregon, City of Portland, Multnomah County, Portland Community College) saw annual growth in spending of 5 – 10% over that same period.[22]

Figure 11: Annual Change in Spending and Inflation



[20] Spending and Efficiency in Higher Education, Joint Legislative Audit and Review Commission, Commonwealth of Virginia, October 2024, p 17.
[21] Ibid.
[22] Comprehensive Annual Financial Reports, FY2015 and FY2024, Statement of Activities, for entities referenced.

Volatility in spending during the 2015 to 2017 period is likely the result of the dissolution of OUS whereby the cost of system operations was distributed amongst the universities or eliminated. Similarly, the 2020 to 2022 period, due to COVID, experienced unusual fluctuations in both operating expenses and inflation.

Table 12 shows the trend in total operating expenses across all funds (i.e., enterprise wide) by university over the past decade. The dollar amounts are in thousands and unadjusted for inflation. The data is from the universities' annual audited financial reports with national data from the 2023 Digest for Education Statistics, table 334.10, published by the National Center for Education Statistics at the U.S. Department of Education.

As previously noted, the annual growth rate is 5.3% which is higher than inflation. However, this varies significantly by university from 2.8% to 6.7%. A national comparison is offered which suggests the annual growth in spending nationally has also been higher than inflation.

Of note, the period used for the national data is not the same. The national data is for FY2013 through FY2022. Also, the national data includes all four-year institutions both public and private, some of which include hospital operations which likely inflate the growth rate. This is because there is no easy way to calculate comparable national data for public universities only without including those with hospital operations.

Table 12: Operating Expenses in All Funds

University	FY2015	FY2024	Number Variance	Percent Variance	Annual Growth
EOU	49,110	77,504	28,394	58%	5.2%
OIT	61,379	109,764	48,385	79%	6.7%
OSU	921,028	1,591,854	670,826	73%	6.3%
PSU	449,907	578,174	128,267	29%	2.8%
SOU	77,889	107,264	29,375	38%	3.6%
UO	785,714	1,286,083	500,369	64%	5.6%
WOU	91,333	119,940	28,607	31%	3.1%
Total	**$2,436,360**	**$3,870,583**	**$1,434,223**	**59%**	**5.3%**
National Data	223,341,630	328,333,563	104,991,933	47%	4.4%

The amount paid for debt service on capital liabilities has increased 19% from FY2016 to FY2024. This is a key component of non-operating spending, although debt service remains manageable. Much of the debt issued for the universities in the recent past has been state-backed debt for capital construction. More information on capital-related debt, debt service payments, and the history of state capital investment is included in the appendix.

Table 13 shows the trend in education and related (E&R) spending over time by university. The data comes from the same sources as noted for Table 12. The dollar amounts are in the thousands and unadjusted for inflation.

E&R spending is a derived metric designed to help policy makers better understand the spending associated with educating students versus spending for research, public service, and auxiliary activities (i.e., housing, food service, retail, and athletics).[23] During FY2024, 44% of all operating spending at Oregon public universities was for E&R down from 48% a decade earlier. This is like the national experience of 48% during FY2022 and 52% a decade earlier. Also, the average annual growth in E&R spending for both Oregon and the nation is less than that of all operating expenses.

Table 13: Education and Related (E&R) Spending

University	FY2015	FY2024	Number Variance	Percent Variance	Annual Growth
EOU	28,936	43,635	14,700	51%	4.7%
OIT	42,216	64,697	22,481	53%	4.9%
OSU	345,412	566,100	220,687	64%	5.6%
PSU	227,323	317,229	89,907	40%	3.8%
SOU	45,774	68,793	23,019	50%	4.6%
UO	431,819	565,836	134,017	31%	3.0%
WOU	56,081	61,406	5,325	9%	1.0%
Total	**$1,177,562**	**$1,687,696**	**$510,134**	**43%**	**4.1%**
National Data	115,869,115	159,191,978	43,322,863	37%	3.6%

The growth in spending by category is consistent with the national experience; however, the growth in spending for institution support is an outlier.
Table 14 shows the trend in total operating expenses by functional category with a national comparison. The largest growth has been in public service followed by institution support. Although the growth in academic support and student services has outpaced general growth as well. The growth in the other category is masked by changes in net pension liabilities. If removed, the growth in that category totals 57% for an annual change of 5.1%.

As a proportion of the total, spending on instruction and research has fallen from 43% to 37% while spending on public service and institutional support has grown from 14% to 19%. This can result from operating below optimal enrollment thresholds resulting in institutional support costs consuming disproportionate shares of operating budgets.

The dollar amounts in Table 14 are in the thousands and unadjusted for inflation. The data is from the universities' annual audited financial reports with national data from the 2023 Digest

[23] Delta Project on Postsecondary Education Costs, Productivity, and Accountability, Issue Brief #2: Metrics for Improving Cost Accountability, February 2009.

for Education Statistics, table 334.10, published by the National Center for Education Statistics at the U.S. Department of Education. The categories listed are defined by the National Association of College and University Business Officers (NACUBO) and are considered industry standard. O&M Plant means operations and maintenance of plant facilities (buildings and large equipment) on campus.

Table 14: Operating Spending by Functional Category

Expense	FY2015	FY2024	Number Variance	% Var	Annual Growth	Annual Growth (U.S. Avg)
Instruction	753,534	1,000,473	246,939	33%	3.2%	3.1%
Research	295,293	447,270	151,977	51%	4.7%	3.4%
Public Service	144,201	342,891	198,690	138%	10.1%	4.0%
Academic Support	172,348	290,494	118,146	69%	6.0%	4.4%
Student Services	94,533	163,090	68,557	73%	6.2%	4.8%
Auxiliary Programs	469,536	679,913	210,377	45%	4.2%	2.5%
Institution Support	191,523	383,224	191,701	100%	8.0%	4.3%
O&M, Plant	116,630	159,527	42,897	37%	3.5%	5.9%
Student Aid	112,005	173,119	61,114	55%	5.0%	8.7%
Other	86,757	230,582	143,825	166%	11.5%	13.8%
Total	**$2,436,360**	**$3,870,583**	**$1,434,223**	**59%**	**5.3%**	**4.4%**

The growth in public service can in part be attributed to growth in related funding, including a doubling of appropriated amounts for state programs and statewide public services since the 2015-17 biennium. Likewise, spending on public services has grown due to relationships with federal, state, and other partners to provide services benefiting all Oregonians. This includes wildfire training for federal agency staff, early childhood education, healthcare services, and others.

The growth in spending on academic support and student services can be attributed to the increasing demand for tailored efforts that focus on support for student completion and success. Much has been heard recently about the need for expanded student support, for basic needs specifically, as reported by the Oregon Student Association.[24] As universities focus more on efforts to serve today's students[25], spending on student services has increased faster than overall spending.

The growth in spending on institutional support may be another issue. Collective spending on institution support, which includes administrative functions like executive, communications, legal, financial, accounting, space management, procurement, IT, and similar business services,

[24] Oregon Student Association (OSA), top issues identified in OSA Statewide Student Survey, slides presented to the HECC Funding and Achievement Subcommittee, May 8, 2024.
[25] HECC analysis of ORS 352.069 report, December 2024.

has increased from 8% of total operating spending to 10% in the past decade. Expressed on a per student basis, it roughly doubled from $2,200 to $4,600 per student. One way for the universities to improve cost efficiency and adapt to revenue uncertainty would be to manage the cost of institution support over time. More on this issue is included later in the report.

Table 14a includes a breakout of operating spending by natural classification, specifically for E&G funding (or general fund). The dollar amounts in Table 14a are in the thousands and unadjusted for inflation. This information comes from the universities in response to an annual survey conducted by HECC staff. The annual growth in the cost of retirement benefits is double that of the growth in wages. More information by university can be found in a report titled, *Financial Sustainability of Oregon Public Universities, 2025* as presented to the HECC Funding and Achievement Subcommittee in June 2025. That report can be found on the HECC website.

Table 14a: Operating Spending by Natural Classification for E&G Funding

Expense	FY2017	FY2024	Number Variance	% Var	Annual Growth
Salary & Wages	808,407	1,018,562	210,155	26%	3.4%
Health Benefits	158,944	201,020	42,076	26%	3.4%
Retirement Benefits	138,465	225,852	87,387	63%	7.2%
Other Benefits	109,468	137,195	27,727	25%	3.3%
Services and Supplies	273,402	389,869	116,467	43%	5.2%
Capital	17,738	16,540	(1,198)	(7%)	(1.0%)
Institutional Financial Aid	5,605	9,400	3,795	68%	7.7%
Net Fund Transfers	53,902	50,392	(3,510)	(7%)	(1.0%)
Total	**$1,565,931**	**$2,048,830**	**$482,899**	**31%**	**3.9%**

Operating costs per FTE have exceeded both the rate of inflation and that of spending overall in large part due to the cost of benefits and enrollment declines. When accounting for enrollment by considering the growth in operating expenses per student full-time equivalent (FTE), over the past decade the universities have experienced a 66% total increase or average annual increase of 5.8%. This is both higher than the rate of inflation and overall growth rate of spending. Table 15 includes additional information by university unadjusted for inflation.

Table 15: Operating Expenses per FTE

University	FY2015	FY2024	Number Variance	Percent Variance	Annual Growth
EOU	18,787	34,729	15,943	85%	7.1%
OIT	20,576	34,840	14,264	69%	6.0%
OSU	34,594	50,541	15,947	46%	4.3%
PSU	21,035	37,868	16,834	80%	6.8%
SOU	17,710	31,271	13,562	77%	6.5%
UO	33,113	54,574	21,461	65%	5.7%
WOU	19,025	33,545	14,520	76%	6.5%
Total	**$28,154**	**$46,793**	**$18,639**	**66%**	**5.8%**
National Data	19,111	28,520	9,409	49%	4.5%

The data in Table 15 comes from the universities' annual audited financial reports with FTE data from the Public Universities Data Dashboard. National data is from the 2023 Digest for Education Statistics, tables 334.10 and 303.25, published by the National Center for Education Statistics at the U.S. Department of Education. The national data covers a different period and includes all four-year institutions, both public and private, some of which include hospital operations. This is because there is no easy way to calculate comparable national data for public universities without including those with hospital operations.

It is reasonable to expect that spending increases as enrollment grows. Even with flat enrollment, spending may increase due to general wage and benefit cost growth over time. However, during periods of enrollment decline spending per student often continues to increase unless structural changes are made. It is also the case that the universities have fixed costs, such as facilities, insurance, utilities, or contractual obligations, that do not decrease when student enrollment declines.

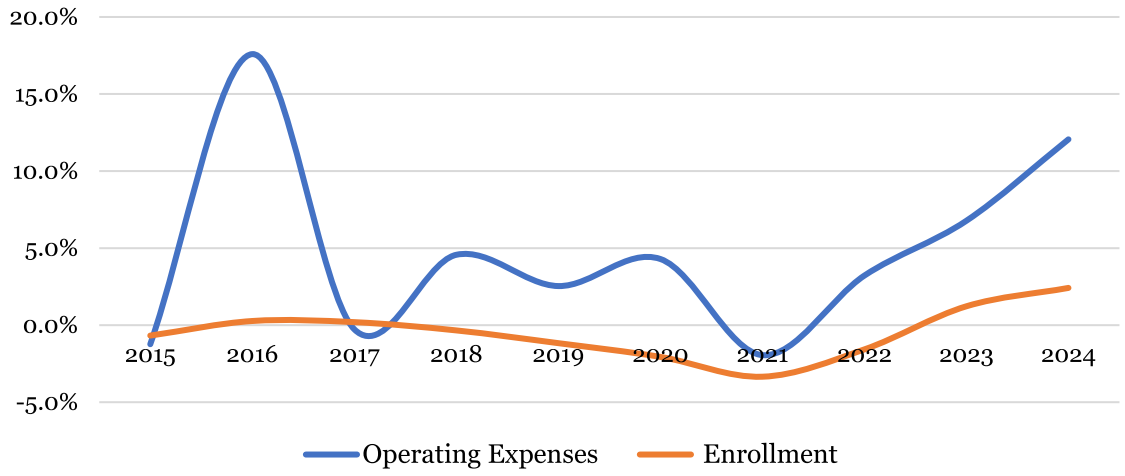
As noted in the Oregon Higher Education Landscape Study, "Public institutions in Oregon have higher expenditures per FTE in spending categories related to their missions. One explanation for this may be found in data that show Oregon's four-year institutions spend more on employee benefits, as a percentage of salaries, than do other states and the nation overall."[26] Considering the E&G (or general) fund spending from FY2017 through FY2025, total benefits have grown in cost from 50% to 56% of wages compared to a national average of around 40% to 45%. Total benefits have grown on average 4.9% annually with pension contributions alone increasing an average of 7.6% annually to an estimated $249.1 million during FY2025. For comparison, total revenue has grown an average of 3.6% annually.

[26] National Center for Higher Education Management Systems (NCHEMS), Oregon Higher Education Landscape Study, September 2022, p 14 and 75 (figure 56).

Also, considering data in Table 15, there is a significant difference in spending per FTE by type of university. For UO and OSU combined, spending per FTE increased by 54% from $33,896 to $52,267. For the remaining universities, it increased by 78% from $20,185 to $35,893 influenced by enrollment changes. Granted, the TRUs and PSU are spending roughly 30 percent less per student than UO and OSU likely due to fewer research and public service demands.

Figure 16 compares annual growth in operating expenses over the past decade to enrollment growth. Average annual growth in spending was 5.3% while enrollment declined on average by 0.5% per year. This suggests significant fixed costs, costs uncorrelated to enrollment, and/or inflexible cost structures exist across the public universities. The period between 2015 to 2017 is likely anomalous due to the dissolution of the Oregon University System.

Figure 16: Annual Change in Spending and Enrollment



Staffing grew while enrollment declined with significant variation by university. Public universities are labor-intensive. The largest expense is staffing (i.e., both wages and related benefits), which makes up, on average, 78% of total E&G spending. The overall trend has seen staffing grow by nine percent while enrollment has declined seven percent. Granted, in the second half of the period noted, from 2018-19 to 2022-23, both student and staff FTE have declined, but not to the same magnitude. Table 17 includes more information.

The data in Table 17 comes from the U.S. Department of Education's Integrated Postsecondary Education Data System (IPEDS). Specifically, from the frequently used variables, unduplicated 12-month student FTE and total staff FTE.

Table 17: Trend in Staffing and Enrollment

Year	Student FTE	Staff FTE	Student to Staff Ratio
2013-14	85,171	13,437	6.3
2014-15	84,684	14,059	6.0
2015-16	85,221	14,478	5.9
2016-17	85,729	15,008	5.7
2017-18	85,101	15,152	5.6
2018-19	84,702	15,303	5.5
2019-20	82,611	15,325	5.4
2020-21	79,921	14,485	5.5
2021-22	78,032	14,142	5.5
2022-23	79,103	14,628	5.4
Variance 2013-14 to 2022-23	**(6,068)**	**1,191**	**(0.9)**
	(7%)	**9%**	**(15%)**

It should be noted that ORS 350.360 requires the HECC to conduct an annual review of each public institution of higher education with respect to the employment of all employee groups. The most recent version, titled *Report to the Oregon Legislature, Higher Education Employees, 2025,* can be found at the HECC's website. Although IPEDS data is also used in this report, to allow for a longer period of analysis, the data in both sources is consistent.

Table 18 shows the trend in staffing by university using the same source of data as in Table 17. Three have experienced double-digit staffing growth while three have experienced negative staffing growth since 2013-14. The three with negative staffing growth have also experienced some of the largest enrollment declines.

Table 18: Trend in Staffing by University

University	Academic Year 2013-14	Academic Year 2022-23	Number Variance	Percent Variance
EOU	321	377	56	17%
OIT	366	476	110	30%
OSU	4,654	5,494	840	18%
PSU	2,541	2,535	(6)	0%
SOU	624	523	(101)	(16%)
UO	4,204	4,544	340	8%
WOU	727	679	(48)	(7%)
Total	**13,437**	**14,628**	**1,191**	**9%**

Staffing grew the most in academic and student support areas while also growing in business and financial operations support.
Table 19 looks at the trend in staffing by select occupations. Positions related to the core mission (i.e., instruction, research, and public service) have decreased slightly over time even though total instruction FTE has increased as shown in Table 21. Staffing increased the most in student affairs, academic affairs, and other educational service areas likely due to additional support in academic advising, counseling, and related areas.

It should be noted that changes in staffing levels in categories not directly related to the mission are not always correlated to cost inefficiency. For example, staffing may be mandated due to investments by federal, state, or local funding partners. Also, universities may make business decisions to forego outsourcing certain activities, which may also increase staffing levels.

The data in Table 19 comes from the U.S. Department of Education's Integrated Postsecondary Education Data System (IPEDS). Specifically, from the frequently used variables, average salaries and full-time equivalent staff, and FTE staff by occupational category. The other category includes librarians, auxiliary, maintenance, security, technology services, and positions for which the need may not be correlated to enrollment.

The growth in business and financial operations staffing (i.e., accounting, payroll, procurement, etc.) could be related to the movement away from the use of shared administrative support services as described later in this report. It is also likely that the number of student and academic affairs support staff has grown due to increased compliance and reporting requirements. Recent data on unfunded mandates for the public universities identified 475 total reporting mandates, nearly 300 of which are federal and approximately 154 are state, related to discrimination provisions to financial aid programs to copyright requirements.[27]

Table 19: Trend in Staffing by Select Occupations

Category	Academic Year 2014-15	Academic Year 2022-23	Number Variance	Percent Variance
Instruction, Research, and Public Service	5,869	5,603	(266)	(5%)
Student and Academic Affairs, and Other Education Services	742	996	254	34%
Business and Financial Operations	1,688	1,932	244	14%
Office and Administrative Support	1,477	1,355	(122)	(8%)
Other Staff	4,283	4,742	459	11%
Total FTE Staff	**14,059**	**14,628**	**569**	**4%**

[27] HECC analysis of ORS 352.069 report submitted by the universities, December 2024.

Cost Efficiency

Each university has an independent governing board with members appointed by the Governor. Ultimately, governing board decisions determine spending levels based on available revenue. The changing higher education landscape will require efforts by the universities to maximize efficiency, manage spending, and improve student affordability.[28] To assess cost efficiency, several topics are considered including the number of degree/certificate programs offered, the alignment of staffing levels with enrollment, degree productivity and degree completion spending, the use of shared administrative services, efforts to monitor and control cost drivers, and the trend in costs outside the control of the governing boards.

The number of degree and/or certificate programs offered in the past decade has increased significantly while enrollment has declined during the same period. Table 20 includes the trend by university. This includes all degree and certificate programs at all levels across all academic disciplines. Some of these are certificate programs related to specific program offerings. The data comes from the U.S. Department of Education's Integrated Postsecondary Education Data System (IPEDS). Specifically, from completions, number of programs offered, all award levels, and all CIP codes as accessed July 2025.

Table 20: Programs Offered

University	Academic Year 2013-14	Academic Year 2022-23	Variance
EOU	38	71	87%
OIT	46	50	9%
OSU	253	273	8%
PSU	205	303	48%
SOU	68	107	57%
UO	210	240	14%
WOU	72	265	268%
Totals	**892**	**1,309**	**47%**

It is important to note that an increasing number of academic programs offered does not by itself equate to cost inefficiency. Some of the programs included in Table 20 are academic concentrations, endorsements, and certificate programs which may have added little to no additional, incremental cost or were added with a net neutral fiscal impact.

An increasing number of programs offered over time may have broader benefits such as research and knowledge expansion, civic contributions, a focus on specialized workforce needs, or may even be related to preserving the student experience. However, if incremental, additional

[28] Spending and Efficiency in Higher Education, Joint Legislative Audit and Review Commission, Commonwealth of Virginia, October 2024, p 43.

cost is incurred due to an increasing number of programs offered, and a university is increasingly dependent on tuition revenue with incremental revenue not available to cover additional costs, then the number of programs offered may become a factor in financial sustainability planning.

***Student-to-staff* and *student-to-faculty* ratios have declined over time and differ from the national experience.**

To assess the alignment of staffing levels with enrollment, the student-to-staff ratio is calculated. This includes all staff of the university regardless of function in which they are employed. As noted previously, changes in staffing levels may not be correlated to cost inefficiency. Staffing levels in some areas might be mandated by external funding partners or due to business decisions unrelated to enrollment. However, declining ratios can result from operating below optimal enrollment thresholds creating structural cost inefficiencies.

The trend by university is shown in Table 21. The data comes from the U.S. Department of Education's Integrated Postsecondary Education Data System (IPEDS). Specifically, from the frequently used variables, unduplicated 12-month student FTE and total staff FTE.

Overall, the ratio has declined fifteen percent from 2013-14 to 2022-23 leading to fewer students per staff member. This is because total staffing across the universities combined grew nine percent while the number of student FTE declined seven percent. By university, it varies significantly.

Table 21: Student-to-Staff Ratio

University	Student FTE (2013-14)	Staff FTE (2013-14)	Ratio (2013-14)	Student FTE (2022-23)	Staff FTE (2022-23)	Ratio (2022-23)
EOU	2,894	321	9.0	2,164	377	5.7
OIT	2,994	366	8.2	3,059	476	6.4
OSU	24,795	4,654	5.3	28,790	5,494	5.2
PSU	21,400	2,541	8.4	15,905	2,535	6.3
SOU	4,394	624	7.0	3,709	523	7.1
UO	23,771	4,204	5.7	21,970	4,544	4.8
WOU	4,923	727	6.8	3,506	679	5.2
Total	**85,171**	**13,437**	**6.3**	**79,103**	**14,628**	**5.4**

The student-to-faculty ratio can similarly be calculated. This is often referred to as the student/teacher ratio. The trend by university is shown in Table 22 using data from the same source as noted for Table 21. Overall, the ratio has declined fourteen percent from 2013-14 to 2022-23 leading to fewer students per instructional staff (faculty) member. This is because total instructional staff across the universities combined grew eight percent while the number of student FTE declined seven percent. By university, it varies significantly. All but SOU

experienced a decline. The TRUs plus PSU experienced an average decline in this ratio of eighteen percent while UO and OSU averaged a twelve percent decline combined.

Table 22: Student-to-Faculty Ratio

University	Student FTE (2013-14)	Faculty FTE (2013-14)	Ratio (2013-14)	Student FTE (2022-23)	Faculty FTE (2022-23)	Ratio (2022-23)
EOU	2,894	115	25.2	2,164	147	14.7
OIT	2,994	147	20.4	3,059	196	15.6
OSU	24,795	1,046	23.7	28,790	1,436	20.0
PSU	21,400	1,010	21.2	15,905	957	16.6
SOU	4,394	247	17.8	3,709	176	21.1
UO	23,771	1,075	22.1	21,970	1,090	20.2
WOU	4,923	282	17.5	3,506	251	14.0
Total	**85,171**	**3,922**	**21.7**	**79,103**	**4,253**	**18.6**

For a national comparison, data from the U.S. Department of Education's Digest of Education Statistics (Tables 314.50 and 314.55) is used as shown in Table 23. The methodology is different than the calculations presented in previous tables because both public and private institutions are included. However, while ratios have decreased both nationally and in Oregon since 2017, during Fall 2022 there were roughly 25% fewer students per faculty or staff member in Oregon when compared to the national average. The same general trend can be noted using data found in the *2024 Higher Education Employees Report* as summarized in the appendix.

Table 23: National Comparisons, Public Four-Year Institutions

Ratio:	U.S. Fall 2017	Oregon Fall 2017	Variance Fall 2017	U.S. Fall 2022	Oregon Fall 2022	Variance Fall 2022
Student to Staff	4.7	3.6	(23%)	4.4	3.2	(27%)
Student to Faculty	14.4	10.2	(29%)	13.5	10.1	(25%)

Some efforts to improve quality and student success, like funding additional student support services, can reduce cost efficiency as measured by this report. If incremental additional cost is incurred as a result, and a university is increasingly dependent on tuition revenue with incremental revenue not available to cover the additional cost, then this may become a factor in financial sustainability planning.

The number of degree completions per 1,000 student FTE has increased as has the number of degree completions per $100,000 in spending suggesting improved efficiency. The statewide public university graduation rate has increased over the past decade with the six-year bachelor's degree completion rate at 68%.[29] Six-year bachelor's degree completion trends can be found in the Public Universities Data Dashboard.

However, degree productivity, which accounts for enrollment, is a different metric. It is an attempt to assess cost effectiveness. Table 24 shows the trend in degree productivity over time in the aggregate. It increases because the total number of degree completions for all students has increased while enrollment has declined. The data in Table 24 comes from the Public Universities Data Dashboard. The completions per 1,000 FTE metric is calculated by dividing the number of completions by the number of student FTE and then multiplying by 1,000.

The reader should be cautioned; this metric is different than a graduation rate which tracks student completion by cohort. This metric divides the number of completions by the number of students at a given point in time. As a result, degree productivity is subject to movement in both and should be considered contextually with other metrics if used in governance.

Table 24: Trend in Degree Productivity

Year	Student FTE	Degree Completions	Completions per 1,000 FTE
2014-15	86,537.5	21,979	254.0
2015-16	86,770.9	22,050	254.1
2016-17	86,940.0	22,953	264.0
2017-18	86,643.6	23,428	270.4
2018-19	85,631.2	23,675	276.5
2019-20	83,868.3	23,654	282.0
2020-21	81,062.4	23,955	295.5
2021-22	79,787.6	22,847	286.3
2022-23	80,765.7	21,937	271.6
2023-24	82,718.0	22,147	267.7
Variance 2014-15 to 2023-24	**(3,819.5)**	**168**	**13.8**
	(4.4%)	**0.8%**	**5.4%**

Another way to assess cost efficiency is to consider what is being produced relative to spending. Spending per degree will provide insight into how cost effective the universities are in meeting their educational mission. Table 25 shows the trend in spending per degree by considering the number of completions per $100,000 in spending (i.e., total operating expenses) for all seven universities in the aggregate. The data in Table 25 comes from the data dashboard for degree completions with operating expenses from the universities' annual audited financial reports.

[29] Public University Data Dashboard, 6-year Bachelor's Completion Rate Trends, July 2025.

The completions per $100,000 in spending metric is calculated by dividing expenses by completions and then multiplying by 100. The increase in the number of completions per $100,000 in spending over the past decade suggests improved cost efficiency. A similar trend is observed, although to a lessor magnitude, when restricting the analysis to E&G spending only.

Table 25: Trend in Spending per Completions

Year	Degree Completions	Total Operating Expenses ($ thousands)	Completions per $100,000 in spending
2014-15	21,979	2,437,159	1.1
2015-16	22,050	2,865,868	1.3
2016-17	22,953	2,858,161	1.2
2017-18	23,428	2,988,700	1.3
2018-19	23,675	3,064,521	1.3
2019-20	23,654	3,196,110	1.4
2020-21	23,955	3,133,949	1.3
2021-22	22,847	3,234,820	1.4
2022-23	21,937	3,454,051	1.6
2023-24	22,147	3,870,583	1.7
Variance 2014-15 to 2023-24	**168**	**$1,433,424**	**0.6**
	0.8%	**59%**	**58%**

The use of shared administrative services has declined over time, which may represent a lost opportunity. As noted earlier in the report and shown in Table 14, the annual growth rate for institution support spending over the past decade is almost double the overall growth rate for operating costs in general. Some of the growth can likely be attributed to insurance, compliance, technology, and additional student support costs; however, one way for the universities to improve cost efficiency would be to manage the cost of institution support. As such, a little background might be helpful as provided by USSE staff.

The University Shared Services Enterprise (USSE) was established during the dissolution of OUS in 2015 to manage shared administrative services once performed through the Chancellor's Office. USSE is not a separate legal entity. Rather it is established through a memorandum of understanding (MOU) executed by all seven public universities. The universities participate voluntarily and are allowed to select services as needed.

During the past decade, USSE has been shrinking and offering fewer services as the universities elect to perform more administrative functions in-house. During FY2015, USSE had 32 staff and an operating budget of $4.8 million. The services offered included financial reporting, IT hosting and maintenance, SEIU collective bargaining, payroll reporting and benefits

verification, risk management, and treasury management services including debt accounting and tax compliance. SEIU collective bargaining is required in statute.

During FY2025, USSE budgeted for a staff of 6.2 FTE totaling $1.5 million. USSE offered limited services including collective bargaining, accounting and tax compliance for debt, and endowment management. A summary of changes by type of service is offered below.

- Risk Management – These services were outsourced to a third-party provider during FY2016. The universities negotiate their own insurance needs.

- IT services – During FY2019, the TRUs outsourced IT hosting to AWS Cloud. USSE services were terminated as a result. This included almost half of the USSE staff at the time. Those positions were transitioned back to the universities or eliminated through natural attrition.

- Financial reporting – Four of the five universities are choosing to perform all financial reporting inhouse. This relates to the production and auditing of the annual financial statements. Since external auditing is required, each university will interact separately with an external auditor. USSE stopped offering these services as of June 30, 2024.

- Payroll and benefits reporting – Four of the six universities are choosing to perform this function inhouse which required USSE to terminate service as of June 30, 2024. As a result, two universities, OSU and EOU, have chosen to outsource this function to ADP.

There are ongoing efforts at the universities to monitor and control cost drivers. ORS 352.069, enacted by HB 3288 (2017), directs Oregon's public universities to submit a report to the HECC identifying the actions that have been taken to monitor and control cost drivers, such as administrative services. The version published in December 2022 shows total cost savings and fund balance usage of $56.2 million in FY2020 and $131.1 million in FY2021. Further, within the December 2024 version of the report, the universities report implementing strategies to reduce costs by carving off non-essential activities, when possible, such as:

- Across the board general fund budget reductions include reducing or eliminating vacant positions.
- Capital renewal reorientation.
- Across-the-board services and supplies reductions.
- Salary reductions for high-level managers.
- Furloughs, leave without pay, and use of the Workshare program.

A recent example is the University of Oregon reported to its board in September 2024 the results of savings initiatives across seven administrative support areas. This includes purchasing, treasury operations, utilities and energy, human resources, information services, and other services. Staff reported one-time cost savings of $34.8 million with recurring annual savings of $5.1 million.

Another example is the Administrative Modernization Program (AMP) at Oregon State University as approved by their board in June 2023. Intended to replace the university's 34-year-old core systems for HR, finance, budget, and grant management, the program is comprised of multiple projects staged over a three-year period. Currently budgeted at $81.3 million (including a $9.2 million contingency), the new systems will improve the student experience and reduce costs by an estimated $10 million per year beginning in FY2028.

Another example is the implementation of metrics at WOU to more adequately assess financial health. This includes establishing a baseline and target for the composite financial index (CFI) as well as utilizing the institutional viability metric (IVM) to assess viability based on financial position, market demand, and student outcomes.

Recent Budget Actions

More recent actions have occurred within the universities' education and general (E&G or general) funds to address and improve financial sustainability. These include:

EOU – During FY2025, a $4.8 million (or 8.4%) reduction occurred across all operating units through a shared governance approach to balance expenditures with available resources. The bulk of the reduction, $3.0 million, was in compensation.[30] EOU has also been able to leverage grants and other external funding sources to offset costs.

OIT – During FY2025, following a budget reduction of 1.3% the previous year, a $3.4 million (or 3.9%) reduction was enacted with divisions cut anywhere from 0.2% to 6.1%.[31] OIT has completed three consecutive years of spending reductions to better align spending with expected revenues.

OSU – In spring 2025, OSU began a proactive and collective budget reduction effort focused on containing costs and realigning resources. The result of these efforts has been a 5.2% ($43.8 million) overall reduction to E&G spending, beginning in FY2026.

PSU – During FY2025, PSU engaged in a financial sustainability effort called *Bridge to the Future* which focused on four key areas of adjustment: operational excellence, program revitalization and curricular stewardship, retirements, and net revenue growth.[32] PSU took action to reduce an $18 million operating deficit by reducing the workforce by approximately 104 FTE through vacancies, retirements, non-renewals, and limited layoffs. During September 2025, university leadership presented an updated plan to balance the E&G budget by FY2028. Staff anticipate needing to reduce costs by roughly $35 million through two major strategies: instructional portfolio rebalancing along with administrative and fiscal optimization.[33]

[30] April 2024 Finance and Administration Committee Meeting, FY2025 Preliminary E&G Budget, page 4.
[31] June 2024 Finance and Facilities Committee Meeting, Agenda Item 4.1, Table 1, page 5.
[32] Board of Trustees Meeting, November 2024, Agenda item 6c.
[33] Board of Trustees Meeting, September 26, 2025, Agenda item 11b.

SOU – On August 1, 2025, SOU declared financial exigency to transform the university to address existing structural deficits. During the September 2025 board meeting, a plan to reimagine the university was presented and a budget update was provided. The plan calls for an E&G budget target of $60 million, a more focused academic portfolio, and more than $10 million in savings over the next four years.[34]

UO – During FY2026, it was announced that staff were projecting a $25 – 30 million structural deficit in E&G funds necessitating budget reductions. Since that time, the president and provost have shared with the campus community a proposal to enact $29.2 million in recurring budget cuts, including eliminating 176 E&G funded positions. This includes 117 layoffs of faculty and staff enacted by September 2025.[35]

WOU – As noted in a recent review conducted by the Northwest Commission on Colleges and Universities (NWCCU), significant progress has been made in controlling expenses. Ongoing efforts have included assessment of vacant positions, maximizing revenue collection efforts, focusing on essential needs, enhancing student-centered activities, and identifying shared services and support opportunities.

There is current state investment in the technical/regional universities to improve long-term financial sustainability.

Additionally, during the 2023-25 biennium, the state invested $25 million to improve the financial sustainability of the four technical/regional universities (EOU, OIT, SOU, WOU) and PSU. The funding, which was appropriated to the HECC, is intended to support them in realigning institutional offerings and resources with current and emerging enrollment and economic realities to achieve long-term financial sustainability. The funds will be used for initiatives that seek to reduce ongoing costs, increase revenue, and improve recruitment and retention in the pursuit of student success.

Of the $25 million total, $6.3 million was allocated to the five participating universities through the existing funding distribution model. The remaining $18.7 million was awarded through a request for applications process. The fifteen projects funded via that process will generate an estimated net return of $95 million over the next five years after implementation. This is above the one-time cost of the projects. The projects include:

For EOU, the expansion of their current high-demand graduate health program array. They will add three additional graduate degree programs to serve regional workforce needs. The programs target adult and returning students by allowing them to complete the program online and by using clinical observation sites close to the students' home in collaboration with regional partners. An investment of $2.3 million will return an additional, estimated $2.3 million in net, incremental tuition/fee revenue during the first five years.

[34] Board of Trustees Meeting, September 11, 2025, Agenda item 2.1.
[35] Full Board of Trustees Meeting Materials, September 15-16, 2025, Agenda item 5e.

For OIT, five projects are funded totaling $2.3 million. These include three projects focused on optimizing the student experience through digital transformation, student retention and success coaching for online students, and supported re-entry for stopped-out students. The two remaining projects focus on the strategic realignment of financial operations with improved data analytics and improving course scheduling via improved course demand analysis and faculty workload management. Summed together, an investment of $2.3 million in these projects is expected to generate an estimated $3.9 million in net incremental revenue and cost savings within the first five years after implementation.

For PSU, $7.0 million in funding will be used for four programs that seek to reduce ongoing costs, increase revenue, and improve student success in alignment with its new strategic and financial sustainability plan. The four programs include:

- **Academic program revitalization** – a plan to engage the campus community to revitalize the academic program portfolio by aligning offerings with current realities including market demand and academic results. A $2.6 million investment is projected to save $10.5 million annually or an estimated $55.8 million in the first five years after implementation.
- **Operational excellence** – a plan to align administrative structures with PSU's current fiscal reality by building a hybrid model for service delivery which includes a more robust centralized approach. A $3.6 million investment is projected to save $5.5 million annually or an estimated $21.2 million in the first six years after implementation.
- **Data analytics to improve student success** – a project to transform student success initiatives by applying the Georgia State model of data analytics to improve student retention. A $363 thousand investment is projected to provide additional net incremental tuition/fee revenue of $468 thousand annually after implementation resulting from improved student retention.

For SOU, the plan is to invest in three projects aligned with their existing financial sustainability plan called SOU Forward. The projects include:

- **Core information system replacement** – a project that allows SOU to complete the enterprise technology infrastructure system transition from Banner to Workday. A $1.1 million investment is projected to save $700 thousand annually after implementation with a return on investment expected by year two.
- **Solar advancement** – an investment to achieve the goal of reducing energy reliance on non-renewables, allowing SOU to generate 100% of daytime energy use through solar. A total of $1.5 million in both state and federal funding minus expenses of $853 thousand is expected to generate savings of over $1.5 million in energy costs during the 25-year life span of the equipment generating a net financial impact of $2.1 million.
- **Website Replacement** – a plan to accelerate the existing website redesign effort. The goal is to be a more user-friendly, enrollment-centric, accessibility complaint model. A $323 thousand investment is expected to generate incremental net tuition/fee revenue of $567 thousand in the first year after implementation alone assuming a five percent growth in applications and a consistent yield rate.

For WOU, a comprehensive initiative to upgrade their current Banner system to enhance functionality to standardize and streamline existing administrative processes across departments. A $2.3 million investment is projected to save $750 thousand annually, mostly in personnel costs, with a total net financial impact of $1.1 million in the first five years after implementation.

Additionally, funding is set aside for collaborative activity. Currently this includes a shared services feasibility study to determine the best approach for the five universities to share similar administrative functions which could include some of the services previously provided by USSE. The universities have identified several services they believe are the best candidates for a shared model and are focused on determining the tangible next steps associated with implementation. Oregon's seventeen community colleges are also performing a similar analysis of the potential for shared administrative services.

Detailed Recommendations

The efficiency findings contained in this report, combined with the demographic challenges facing higher education institutions over the next 1-2 decades and the state's difficult fiscal environment, strongly suggest that bold action is necessary to guarantee the ongoing vitality of Oregon's seven public universities.

Aggregated data for the universities shows spending on core activities ("Education and General" accounts) growing annually at a rate greater than associated revenues. Despite the efforts that universities have made to balance annual budgets, including through spending cuts, forecasting shows that budget gaps are likely to continue into the near future. On the current path universities will be forced to continue to make substantial cuts annually or, in aggregate, fund balances will be completely exhausted within an estimated three to five years. More detailed information is included in the appendix starting on page 59. While each of the seven public universities will experience these trends differently – some perhaps even managing to stay cash-positive – Oregon needs all of its public higher education institutions to thrive.

There is no simple or obvious path forward. Many of the factors putting upward pressure on expenses at public universities are common to public sector employers generally, including the costs of providing health care, retirement, and living wages for employees. But universities face a dual threat in their ability to cover those rising costs through revenue increases. On the one hand, they face extraordinary competition for limited public (i.e. state) resources – a situation exacerbated by slowing growth forecasts for state revenue and recent federal cuts to health and human service programs. On the other, Oregon's demographics suggest that college enrollment is unlikely to grow quickly enough for tuition revenue to keep up with growing expenses, especially given students' increasing sensitivity to college costs. Especially given Oregon universities' unusually high dependence on tuition for revenue, this creates an unsustainable dynamic. While some institutions may be short-term winners in the growing competition for a stable or declining pool of students, the system as a whole is harmed.

Oregon's experience is not unique. Colleges, universities, systems, and states across the country are experiencing similar pressures. Only a few high-growth states can still afford a system of higher education built on the "every campus for itself" model of the past. Since 2020, dozens of public and private colleges and universities have closed campuses or shut down altogether. Others are exploring or undertaking major steps to restructure for institutional sustainability.

At an *institutional* level, persistent budget deficits leave campus leaders with few good options. This is complicated by shared risks and shocks that echo across institutions. Eventually, they are forced to cut expenses: including some of the very programs and positions that are vital for sustaining the public's confidence, the community's support, and, most importantly, the student enrollment that is critical for revenue.

At the *inter-institutional* or state level, other, more creative options emerge. Alignment, partnership, and planning can help to sustain access to high quality education for Oregonians

while closing at least some of the gap between expenses and revenues. In the emerging environment, interdependence is structural, not incidental.[36]

Each of Oregon's seven public universities is vital for its community, its region, and the state. The purpose of our recommendations is to ensure that each of the seven not only survives, but flourishes. Drawing from the findings and analysis contained within this report, our recommendations focus on actions that would substantially alter the structure for the delivery of public university services, including academic and administrative programs. They focus on optimizing economies of scale by increasing the "systemness" of our institutions.[37] They promote the coordination and partnering of programs and services as a way to expand access while keeping public education affordable for Oregonians.[38]

Increasing *systemness* does not mean creating a *university system*.[39] It would be a mistake to think Oregon's challenges can be met by focusing on governance. A centralized system governed by a single board and executive – such as the one Oregon had for public universities until 2015 – isn't necessary to establish the types of inter-institutional partnerships and careful differentiation that we envision. Moreover, the experience of other states – as well as Oregon's prior to 2015 – teaches us that a single central governance structure does not in and of itself guarantee robust systemness. Oregon's universities, and the State, have benefited from the philanthropy, innovation, and accountability that were fostered by the separation of the Oregon University System into seven individually governed entities. Our challenge now is to better harness and coordinate the energy of these independent institutions to achieve collective outcomes that no single institution could achieve on its own.

Pursuing these strategies will not be easy. A sustained legislative and Gubernatorial vision and commitment will be required to see this work through to the point where it could generate substantial savings while bolstering the value and vitality of all of Oregon's public universities.

Recommendations:

1. An opportunity exists for Oregon to exploit scale to create a competitive advantage in workforce and talent development on a regional or statewide basis, and to drive collaboration rather than competition.[40] **The Legislature should direct HECC, in consultation with all of Oregon's public higher education institutions, including community colleges, to develop a proposal, or proposals, for**

[36] Dan Greenstein, Managing Director, Baker Tilly Advisory, *The System is the Strategy*, blog post, 12/13/2025.
[37] ORS 352.025(2): "The Legislative Assembly also finds that: (a) even with universities with governing boards, there are economy-of-scale benefits to having a coordinated university system; and (b) even with universities with governing boards, shared services may continue to be shared among universities."
[38] Deloitte Insights, 2025 Higher Education Trends, A look at the challenges and opportunities shaping America's higher education sector. Deloitte Center for Government Insights. April 2025.
[39] Oregon Higher Education Landscape Study, National Center for Higher Education Management Systems (NCHEMS), September 2022, p 21, recommendation #4: "Oregon's public postsecondary education sector should adopt coordinated, collective, systematic behaviors, which can be achieved without resorting to governance changes."
[40] TRU+ PSU Financial Sustainability Funding, National Center for Higher Education Management Systems (NCHEMS), January 2024, p 48: "Moving forward, it will be imperative for the institutions to identify collaborative strategies for financial sustainability."

targeted institutional integration by January, 2027.

- "Institutional integration" can take different forms. At one end of the continuum, it could involve a full merger of two or more institutions; at the other, it could involve a cooperative of independent fiscal and academic entities operating under a single system policy umbrella and seamlessly sharing certain programs and services.
- Planning should consider models for integration on a statewide or regional basis. An example of the former could include a formal affiliation between the state's regional universities; the latter could include combining services provided to the same region by a community college and a public university.
- Priority should be given to institutions that express interest in deeper levels of integration, but planning should consider all institutions and potential options.
- The final plan, or plans, should show how integrated institutions would share certain administrative services (e.g. payroll, procurement, compliance, auditing, IT, legal) over and above what they already share today. This should be informed by the result of the shared services analysis that consultants are currently undertaking for PSU and the Technical and Regional Universities (TRUs), but may be broadened to include other institutions as well. An independent, third-party entity could be considered for the provision of certain shared services.
- The final plan, or plans, should show how integrated institutions would share certain academic programs and student services in order to maintain or enhance access and options for students while reducing duplication.

2. Today, new degree programs and significant changes to degree programs must be approved by HECC, but no mechanism exists for the State to review programs for sustainability, value, or other criteria. **The Legislature should require academic degree programs at public universities to be periodically reviewed and renewed by HECC.**

    - Legislation could require academic degree programs to periodically demonstrate that they produce value for students and communities, don't unnecessarily duplicate other institutional offerings, are critical to the institution's mission, and meet minimum enrollment or other financial sustainability requirements.[41]
    - Legislation should strictly limit the factors HECC could use to determine a program should not be renewed, and should provide universities with a substantial window (e.g. 1-3 years) for program corrections before potential closure. HECC should be required to take into account impacts on underrepresented students, institutional missions and priorities, statewide workforce needs and not strictly financial returns to the individual, and must be guided by well-researched policy, not ideological preferences.
    - Likely would require amendments to ORS 350.075 and 352.089.

[41] Donna M. Desrochers, Rick Staisloff, and Katie Hagan, *The Financial Sustainability of Higher Education: Bright Spots & Challenges 2012 to 2022*, RPK Group, February 2025 p 6, recommendation #5.

3. Alongside the biennial adoption of the Public University Support Fund, the Legislature should consider **appropriating a separate salary pool to support essential compensation increases.** This would set reasonable, state-level expectations for institutions and their employee groups about biennial compensation increases.

4. Many public universities rely on IT systems that are 20+ years old. These systems are inadequate for current needs and vulnerable to cyberattacks. Some institutions are preparing to replace enterprise-wide systems, or are in the process of doing so. **In setting priorities for state higher education capital investments, the HECC and the Legislature should put a greater emphasis on the replacement of IT infrastructure.**[42]

    - State-backed bonds (Article XI-Q and XI-G) can be used for IT infrastructure, as long as they create a capitalized asset. Using state-backed bond funding to replace major IT systems would reduce institutional costs and improve operational efficiency. State funding can also be used as an incentive for institutions to build common IT platforms that can help promote inter-institutional integration as described under recommendation #1 above.

5. The one-time funding that the Legislature provided in 2024 to improve financial sustainability efforts at the TRUs and PSU supported efforts to streamline academic programs, improve student services, and share administrative services. **The Legislature should fund targeted sustainability and integration efforts at public universities.**[43]

    - Expanding this work to encompass all public universities – and possibly community colleges – would help achieve the benefits of a broader, collective approach.
    - The Legislature should consider establishing a strategic fund within the Public University Support Fund that could be deployed for these purposes. This could resemble the strategic fund within the Community College Support Fund.

[42] Dan Greenstein, Managing Director, Baker Tilly Advisory, *The System is the Strategy*, blog post, 12/13/2025: "For most systems [of higher education],… a new operating model [will require] the development of interoperable data and technology infrastructure that works across campuses and integrates education, business, and admin functions."

[43] Oregon Higher Education Landscape Study, National Center for Higher Education Management Systems (NCHEMS), September 2022, p 25, recommendation #4c: "Oregon should incentivize collaborative activity among institutions and between institutions and other partners…partially supported with state funds, both to seed activity and to ensure its sustainability."

University Feedback

This section allows the public universities the opportunity to provide additional context for the benefit of the reader. The goal is a more complete and shared understanding. The content of this section is verbatim feedback provided by the universities who are listed alphabetically.

Eastern Oregon University

Eastern Oregon University (EOU) appreciates the analysis provided through the Higher Education Coordinating Commission's *Spending and Efficiency in Oregon Public Universities* report. We recognize the Legislature's intent in calling for greater attention to cost efficiency, financial sustainability, and student affordability. As Oregon's rural-serving university, EOU has taken deliberate steps to manage costs responsibly while protecting access and quality for the students and communities we serve.

Affordability and Student Costs

EOU remains committed to being Oregon's most affordable public university. Over the past decade, EOU recorded the lowest increase in total cost of attendance among all Oregon public universities, just 21% compared to the statewide average of 32%. The average net price for EOU students has grown at a modest 2.5% annually, below both state and national averages. Most importantly, EOU's affordability rate improved from 57% to 32% in that period, reflecting targeted investments in financial aid and remission programs. Looking forward, EOU will continue to expand affordability initiatives by strengthening financial aid outreach, improving financial literacy resources, and aligning tuition-setting strategies with our mission to serve rural, first-generation, and adult learners.

Spending and Operational Efficiency

EOU has acted decisively to balance expenditures with available resources. In FY25, EOU implemented a $4.8 million budget reduction (8.4%) across all units through a collaborative governance process, with the most significant savings achieved in compensation. EOU has also been able to leverage grants and other outside funding sources to offset costs. At the same time, EOU has demonstrated fiscal discipline in managing debt, reducing long-term capital liabilities by nearly 30% since 2015 and keeping debt service growth among the lowest of Oregon universities. Recent operational efficiencies include outsourcing payroll tax reporting to ADP, eliminating duplicative administrative processes, and aligning spending with enrollment realities. It is essential to note that many EOU employees already "wear many hats," carrying responsibilities across multiple roles or departments. This has long been part of EOU's culture of efficiency and demonstrates that the university is already operating with lean staffing structures relative to our obligations. Through active and engaged fiscal management, we will continue to pursue efficiency strategies through vacancy management, shared services, and rigorous budget discipline.

Staffing and Student Success

Like all Oregon universities, EOU has seen staffing grow as enrollment declined, but our growth has been strategic. Staffing increases have been concentrated in academic and student support areas, including academic advising, counseling, and compliance—areas all directly linked to

improving retention and student outcomes. EOU will continue sustaining targeted staffing in high-impact areas and invest in faculty development and digital learning capacity to ensure academic quality while maintaining cost efficiency.

Academic Program Alignment
While the data indicates EOU has expanded its academic program portfolio from 38 to 71 offerings (+87%), this is misleading, as those numbers now include academic concentrations, endorsements, and certificates. Changes to our academic programs have been made to better serve our regional workforce and have often been implemented without increasing costs or achieved with a net neutral fiscal impact.

This includes the development of graduate programs developed in collaboration with regional leaders that address shortages in rural healthcare and are expected to generate significant enrollment and tuition revenue growth.

Detailed analysis of the degree offerings listed in the table of the draft report for both 2013-14 and 2023-24 are:

- 2013-14: 21 majors, 7 masters, 2 AA, and 8 certificates = 38
- 2022-23: 42 majors and concentrations (31 majors + 11 concentrations), 7 BAS's, 1 AA, 16 masters with endorsements, 5 certificates = 71

The totals of 38 and 71 programs in the report are accounted for, yet it appears that 16 unique concentrations in the 2013-14-degree count were not included. Including these brings the 2013-14-degree count to 54, which in turn reduces the increase to 31%.

In addition, three of the BAS degrees added since 2017 have identical program requirements as their BA and/or BS versions, meaning no new program courses were needed. Likewise, the IT Management degree was built entirely on existing courses, and no additional resources were required.

With the $2.3 million investment of sustainability funding, EOU is expanding high-demand graduate programs that will support both regional workforce needs and financial sustainability. Our future program strategy will focus on aligning our offerings with labor market demand, with a particular emphasis on healthcare, education, and technology. We will continue to expand our online and hybrid delivery options to serve adult and rural students.

Shared Services and Collaboration
EOU acknowledges and shares concern about the statewide decline in shared administrative services and the resulting rise in institutional support costs. To counter this trend, we have already adopted outsourcing solutions and are participating in the TRU+PSU sustainability initiative. EOU is also currently in discussions with regional partner education providers to collaborate on shared resources. We remain committed to working with peer institutions to explore service models in areas such as information technology, procurement, and compliance, ensuring administrative functions are managed at the lowest sustainable cost.

Financial Sustainability
EOU has a strong record of conservative fiscal management, as evidenced by declining long-term debt and proactive expense reductions. Even as enrollment headwinds persist, we remain committed to aligning our operations with available revenues, maintaining prudent reserves, and protecting affordability for our students. Our multi-year financial planning emphasizes efficiency, collaboration, and innovation to ensure long-term stability.

Conclusion
Eastern Oregon University is proud of its progress in advancing affordability, efficiency, and financial stewardship while remaining true to its mission as Oregon's most affordable, rural-serving university. The EOU Board of Trustees has been actively engaged in guiding the university's financial and strategic decision-making. Together, the administration and Board are focused on preserving student affordability and access while maintaining prudent fiscal stewardship.

We are deeply committed to ongoing collaboration with the HECC, the Legislature, and our peer institutions to identify and implement strategies that reduce institutional costs, enhance student affordability, and sustain high-quality educational opportunities for all Oregonians.

Oregon Institute of Technology
We appreciate the opportunity to provide additional context relative to Oregon Tech in response to the Higher Education Coordinating Commission's (HECC) Spending and Efficiency in Oregon Public Universities report which highlights key trends and outlines important observations and insights related to the challenging operating environment impacting Oregon's Public Universities (OPUs).

Background
Oregon Tech has a more than $286 million financial impact to the Oregon economy (a 2.5:1 multiplier) and supports more than 2,500 jobs annually (source: 2023 Economic, Fiscal and Social Impact Analysis- Beacon Economics). Oregon Tech has the highest return on investment of any Oregon Public University and upon graduation its students earn a median starting salary of $61,000 annually (source: 2023 College Education ROI Report).

Like most universities, Oregon Tech has been impacted by the nationwide higher education enrollment decline. This drop occurred primarily in FY 2022, FY 2023 and FY 2024 and stabilized in FY 2025. Even so, Oregon Tech's enrollment is still down about 19% from just four years ago. To remain competitive, Oregon Tech is ensuring its undergraduate, graduate and doctoral degree programs are closely aligned with Oregon's workforce needs and that resources are efficiently managed to meet the needs of students, faculty, staff and to support the university's mission.

Oregon Tech made significant budget reductions in response to enrollment declines between FY 2023 and FY 2025 totaling $3.1 million and utilized $1.85 million from reserve during that same time to achieve balanced operating budgets, while keeping annual student tuition rate increases below five percent. Oregon Tech was able to avoid faculty and staff layoffs or deferments during

the enrollment downturn and maintained quality academic degree programs, while continuing to focus resources on student success, stabilizing enrollment, improving student retention and investing in technology.
While the current fiscal year features a slight enrollment increase, Oregon Tech is revisiting its academic strategic plan, the university strategic plan and business operations to identify opportunities for improved efficiencies and operational effectiveness.

Student Costs
Oregon Tech has worked diligently to limit annual growth in tuition and mandatory fees. Over the past nine years, annual tuition and fee increases have averaged 4.6% compared to the OPU overall average of 4.5% for the same period as shown in Table 6 of the HECC Spending and Efficiency in OPUs report. This still makes balancing the annual budget a challenge as OPUs have not consistently received the minimum biennial University Base Funding (UBF) necessary to offset escalating expenses concentrated primarily in increasing labor, benefits, utilities, technology, compliance and regulatory costs. When state appropriations fall short of covering cost inflation, this increases the dependance on student tuition and triggers additional cost reductions. Since OPUs are labor intensive by the nature of higher education, reducing positions can impact academic quality and student success.

Although Oregon Tech's growth in total cost of attendance over the nine-year period is higher than peer OPUs as shown in Table 7 of the HECC Spending and Efficiency in OPUs report, it was recently discovered that the Oregon Tech Office of Financial Aid revised one of the factors used in the methodology for reporting a few years ago. Rather than using base resident tuition, Oregon Tech uses base resident tuition plus differential tuition in the calculation, resulting in a higher total cost of attendance figure, even though the majority of Oregon Tech students do not enroll in programs requiring differential tuition. If this anomaly were netted from the calculation, the annual growth rate for Oregon Tech would approximate 3.6% for the same period, closer to the 3.1% average for OPUs.

Oregon Tech has gradually increased annual student tuition and fee remissions from 14% of gross tuition four years ago to 19% of gross tuition last year. Over the period this is a 36% increase in remissions. This represents $8 million in university funded tuition scholarships and waivers to students for FY 2025 and totals more than $21 million over the past three years.

University Spending and Staffing
As the HECC Spending and Efficiency in OPUs report outlines, a good portion of the overall growth in university operating expenditures between FY 2015 and FY 2024 is attributable to administrative support functions being realigned to the OPUs or the University Support Services Enterprise (USSE) as part of the necessary transition following the dissolution of the Oregon University System (OUS) in 2015. Table 12 in the HECC Spending and Efficiency in OPUs report highlights the change in total operating expenses over the period.

Although Oregon Tech has the highest growth rate in Operating Expenditures over the nine-year period following the dissolution of the OUS at 6.7% annually, it is important to note Oregon Tech is a polytechnic university and that during that same period, Oregon Tech was experiencing enrollment growth in some of those years which put additional pressure on

required support services and infrastructure as well as investment in equipment and additional technology to support its hands-on small group learning model. Oregon Tech also established the Oregon Manufacturing and Innovation Center (OMIC) as a new start-up during this time. OMIC is a unique education and workforce training facility with its own dedicated state funding as well as unique staffing, infrastructure and equipment needs. Oregon Tech was also transitioning its multiple Portland Metro locations into a single consolidated campus with an enhanced infrastructure during the early portion of this period. Finally, depreciation expense on six new or fully renovated buildings increased operating expenses by nearly $10 million over the same period while research grant expenditures increased by nearly $7 million from FY 2015 to FY 2024.

Given this additional context, along with the transition of many administrative support services to the campus level or through the USSE contracted arrangement, it is not surprising that Oregon Tech's overall operating expenses grew significantly over the period.

Institutional support is a subset of total operational spending and has been particularly impacted in recent years by growing compliance and regulatory requirements, escalating labor and benefits costs, information technology and infrastructure investments, migration to cloud-based applications and software as a service (SAS). Most expenses transferred to OPUs following the OUS dissolution were in the institutional support category due to their classification. Even during periods of slow enrollment growth or a limited downturn, many institutional support expenses are fixed by disposition they will not vary directly with changes in enrollment.

Oregon Tech staffing growth in the period between FY 2014 and FY 2023 is primarily attributable to hiring additional staff for growing programs, enhanced academic and student support services, compliance and regulatory affairs, new operations such as OMIC and the Portland Metro campus realignment in addition to adding the support staff needed to provide the administrative functions previously performed at OUS.

Cost Efficiency

Although Oregon Tech added four new programs between FY 2014 and FY 2023, these were strategic investments and were carefully analyzed to evaluate student demand, workforce alignment and advancing career pathways. The process also involves development of a financial proforma to determine what other university resources may be necessary to appropriately support new programs. In some cases, dedicated or unique equipment is essential to the curriculum to simulate real world experiences in the classroom or laboratory. As a polytechnic university, there are often synergies among the degree programs mix that can expand or enrich the student experience or that may also be essential to supporting workforce development opportunities or partnerships.

Oregon Tech continues to have a small student to faculty ratio compared to many OPU peers as highlighted in Table 22 of the HECC Spending and Efficiency in OPUs report. This is an important metric to support small-group hands-on learning experiences.

Oregon Tech has completed three prior consecutive years of spending reductions to better align spending with expected revenues and continues to pursue additional efficiencies such as implementation of the Banner Finance ERP module and Millenium Fast for budgeting. Oregon Tech is also partnering with four other OPUs (SOU, WOU, EOU and PSU) and a leading higher education consultant with proven experience in evaluating shared services opportunities. This initiative is supported through one-time funding from the Oregon legislature. The in-depth assessment will explore and evaluate shared services opportunities among the universities and will recommend a viable path forward including action steps along with a financial analysis outlining return on investment from improved efficiencies and standardization which could bend the cost curve, thereby slowing the rate of growth for support costs for the universities.

Oregon Tech has adjusted to an initial shortfall in enrollment following the COVID years and is positioned to remain a strong and vibrant university serving the state and northwest region.

Oregon State University

Thank you for the opportunity to provide institution-specific context for the Higher Education Coordinating Commission's Spending & Efficiency in Oregon Public Universities Report. Oregon State University (OSU) supports the collective comments submitted on behalf of all Oregon public universities. We offer the following OSU-specific comments to ensure the report accurately reflects our unique mission, funding structure, and cost drivers.

As Oregon's only land grant university and the state's premier R1 research university, OSU operates at a scale, complexity, and scope unmatched by other Oregon public universities. These distinctions create structurally different cost profiles, revenue sources, and compliance requirements that must be considered when interpreting spending and efficiency metrics.

Research Intensity Drives Higher, Mission-Aligned Costs

The report does not account for OSU's status as a premier R1 university where costs are higher due to:

- Specialized research infrastructure (labs, shared research facilities)
- Highly specialized research faculty and staff
- Substantial regulatory, safety, grant management, and compliance requirements

Research growth should be understood as a positive indicator of institutional performance, not cost inefficiency. OSU's research expenditures are cost-reimbursed and produce significant economic value for Oregon – including new jobs, increased tax revenue, and Oregon-based start-ups - as outlined in OSU's Economic Impact Report. Because research staffing and infrastructure scale independently of student enrollment, research intensity will inflate per-student FTE spending metrics in ways not comparable to more teaching-focused institutions.

OSU's Statewide Public Service Mission Significantly Shapes Staffing and Spending

As Oregon's only land grant university, OSU receives substantial dedicated funding for Statewide Public Services (SWPS) - $118M in FY26 – to support Extension, the Agricultural Experiment Stations, and the Forest Research Laboratory. These funds:

- Are restricted to specific statutory purposes

- Support research, outreach, and community-based program not tied to classroom instruction
- Increase staffing and operating costs in categories which may appear unrelated to the academic core

Recent legislative investments - in organic agriculture, water research, wildfire education, and Extension – have appropriately increased SWPS staffing. These increases should not be interpreted as administrative growth or cost inefficiency.

OSU's Enrollment Trajectory Is an Outlier Among Oregon Universities
While the report notes a 7% decline across OPUs, OSU's enrollment grew 16% during this same period – primarily through increased access for Oregonians. This growth has:

- Expanded demand for student support and compliance services
- Increased the need for crisis intervention, mental health support, and sexual assault prevention
- Driven a tripling of disability accommodation requests in the last three years

Additionally, OSU, UO, and PSU have higher proportions of graduate enrollment (OSU & UO at 16%, PSU at 23%), which are costlier to education but essential to Oregon's research and high-skill workforce needs. These enrollment patterns significantly affect cost and staffing comparisons across OPUs.

OSU Delivers Exceptional Economic Returns to the States
Despite comparatively lower state funding levels, OSU remains a strong public investment.

- OSU generated $3.5 billion in statewide economic impact in FY2024.
- For every $1 of state support, OSU returned $13.18 to Oregon's economy.

This return reflects OSU's research intensity, statewide footprint, and land-grant mission – all of which require infrastructure and administrative support beyond that of other OPUs.

OSU Has Maintained Student Affordability Through Significant Institutional Aid
The published price of tuition is not an accurate measure of affordability. OSU's average net price increased only 2.5% annually between AY2014 and AY2023 – below CPI growth over the same period – largely due to OSU's substantial investment in institutional aid:

- Federal aid: 54%
- State aid: 6%
- **OSU institutional aid: 31%**
- External aid: 9%

OSU provides this aid despite low state appropriations, and these investments represent real institutional costs borne by the university, to support students' access and success.

Growth in Institutional Support Costs Reflects Statewide, Federal, and Systemic Requirements
Like the other OPUs, OSU faces increasing administrative costs, including those driven by:

- Cybersecurity, ERP modernization, and basic IT infrastructure

- Federal and state compliance (Title IV, VI, IX, HEA; tax compliance)
- Research administration and safety requirements
- Necessary augmentation of legal, audit, treasury, payroll, and board support functions.

These are mandatory compliance and modernization costs, not discretionary spending.

OSU Continues to Lead in Cost Containment and Modernization
OSU has taken decisive steps to control long-term costs, including:

- An enterprise modernization effort centered on Workday, expected to generate an estimated $10.8M in recurring savings.
- Full centralization of HR, payroll, financial services, and accounting.
- Exploration of additional centralization in IT and marketing and communications.
- A proactive FY2026 budget reduction effort, producing a 5.2% ($43.8M) decrease in Education & General spending.

These actions demonstrate a rigorous and disciplined approach to institutional efficiency.

In conclusion, OSU's spending and efficiency must be understood within the context of its research intensity, statewide obligations, enrollment growth, and mission-critical compliance requirements. These factors meaningfully differentiate OSU from other Oregon universities and should inform interpretation of cost comparisons across OPUs.

Oregon State University remains committed to transparency, stewardship, and partnership as the state continues to assess university spending and efficiency. Thank you for considering this additional context.

Portland State University

Portland State University remains deeply committed to advancing cost efficiency, ensuring student affordability, and maximizing the return on investment for the State of Oregon. We are proud of the work our staff and faculty have completed towards these goals to date, and want to emphasize the importance of reviewing institution-specific data to fully reflect the efficiency measures already underway at PSU, and the value of an urban research institution with an access mission. PSU would like to highlight the following items for Members of the Oregon Legislature, the Higher Education Coordinating Commission, and other readers of the report:

1. Demonstrable Leadership in Net Price and Affordability

We are pleased to see the report acknowledge a trend across universities of stabilizing net price growth. At Portland State University, the data shows the institution living up to its access mission: during the period analyzed in the report, PSU's average net price growth was only 1.6%, which is significantly lower than the national average growth of 4.8%. Furthermore, PSU's average discount rate for financial aid recipients has also increased from 45% to 47%, which is higher than the national average of 31%. This performance is a direct outcome of PSU's commitment to equity and access, demonstrating that cost management and affordability are central to our institutional mission.

2. Prudent Fiscal Management

While the report concludes that operating spending growth has exceeded inflation, in aggregate, the data at all institutions does not support that narrative. For example, while inflation from 2015 to 2024 was 3.6%, PSU expenses grew by just 2.8% during that same time frame.

3. PSU's Institutional Support Spending Mirrors National Average

The report suggests that institutional support spending is an outlier. PSU data shows that this is not the case for the institution; the institutional support spending grew at 4.6%, which is very similar to the national average of 4.3% and not comparable to the aggregate growth of 8% over all Oregon Public Universities.

4. Evidence of Efficient Staffing and Administrative Optimization

The report notes that staffing grew in academic and student support. However, the data provides more nuance for PSU. While staffing in academic and student support areas did grow by 56 FTE, this was balanced by a decrease of the same amount in business and financial operations support. Overall, PSU's total staff FTE decreased by 106 FTE, contrasting sharply with the aggregated growth of 569 FTE for all Oregon Public Universities.

Additionally, during the 2024-25 fiscal year, PSU took actions to reduce an $18 million operating deficit. Through that work, we reduced our workforce by approximately 104 FTE through vacancies, retirements, non-renewals, and limited layoffs.

These reductions are significant and affirm that PSU is ahead of the curve in administrative and fiscal optimization, ensuring a focus on the core mission while improving student-to-staff ratios.

5. A Commitment to Ongoing Cost Efficiency

The most recent proactive workforce adjustments cited above are key components of our institution-wide financial sustainability plan, *The Bridge to the Future*. This initiative is a multi-year effort that began by addressing the aforementioned $18 million operating deficit in the last fiscal year and is now focused on achieving a balanced E&G budget. A commitment to stewardship is at the heart of this initiative. Carefully managing our financial, natural, and cultural resources is vital to reaching our aspirations and continuing our important work for our students and communities long into the future.

Our current financial sustainability planning includes an ongoing commitment to achieve approximately $35 million in net cost reductions by FY2027-28. This aggressive target is being pursued through two primary, data-informed strategies:

- Instructional Portfolio Rebalancing: This effort is focused on maximizing resources by aligning academic programs with student demand, community needs, and institutional strengths, sunsetting programs that are no longer delivering value compared to cost, and ensuring the most cost-efficient delivery of our educational offerings.

- Administrative & Fiscal Optimization: This strategy targets administrative efficiencies across all units. As evidenced by the staff reductions noted above, we are consistently reviewing and restructuring administrative functions, leveraging technology, and eliminating redundancies to achieve sustainable cost savings without compromising essential student support services.

Southern Oregon University

On behalf of Southern Oregon University (SOU), thank you for the opportunity to review and provide feedback on the latest draft of the Budget Note report concerning the cost drivers of higher education in Oregon. We appreciate the Commission's diligent work in examining the complex financial landscape facing our state's public universities. The report provides a valuable starting point for understanding the systemic pressures on our institutions.

We have only three additional comments on the draft for your consideration:

- We appreciate that you note in many instances the significant variations among universities in various aspects of E&G spending and revenue. Southern Oregon University believes the report would be enhanced by identifying the factors contributing to these significant differences in terms of costs, tuition increases, and sizes of reserve funds. A deeper analysis here would acknowledge the diverse missions, operational scales, and regional economic factors that influence each institution's financial strategy and position.
- Furthermore, wherever possible, we request that the report list the actual ranges of variation for key financial metrics, rather than relying solely on collective figures or averages to portray all universities. This transparency will provide the Legislature and stakeholders with a clearer, more accurate understanding of individual university challenges and successes. Providing a range allows for a more informed discussion on tailored solutions, rather than a one-size-fits-all approach that may not serve the unique needs of institutions like SOU and the communities they serve.
- Finally, we note that a consistent theme of this report is around shared services. We propose including an estimation of potential savings if universities increase their use of shared services. Southern Oregon University is committed to exploring efficiencies and believes a data-driven analysis of shared services could highlight tangible opportunities for cost containment across the system. Quantifying these potential savings would provide a clear path forward for collaborative efforts and demonstrate a commitment to fiscal responsibility.

Thank you again for considering these crucial points. We are confident that their inclusion will result in a more robust, equitable, and actionable final report that better serves the entirety of Oregon's higher education landscape. We look forward to continuing to work with you and the Commission on this important initiative to help universities operate efficiently while supporting students and fulfilling their respective missions.

University of Oregon

Thank you for the opportunity to provide institutional context for some of the data charts in the Spending & Efficiency in Oregon Public Universities report. There are a few tables below for which we would like to provide additional information.

Table 6: Undergraduate, Resident Tuition and Mandatory Fees

In the fall of 2020, the University of Oregon implemented a Guaranteed Tuition Program for undergraduate students. This program locks tuition rates and administratively controlled mandatory fees for incoming cohorts of undergraduate students for five years. In order to implement the program in a revenue-neutral manner, the institution had to increase tuition by a larger increment in 2020 than would be necessary if tuition were increasing annually for all students each year. This, at least in part, accounts for why our tuition rates appear higher than other universities in Table 6.

It's important to recognize that this chart is not an apples-to-apples comparison since the rates shown for the UO will not change for the entering cohort of students for five years whereas other schools will be increasing their rates each year. The other important factor that affects tuition rates is the level of state appropriation that each university receives. As Figure 4 of the report shows the University of Oregon receives the lowest level of state funding as a percent of revenue.

When analyzed on a "per fundable" student basis, the institution receives thousands of dollars less per student than the other universities. This low level of funding affects tuition rates. Please note that the issues related to the guaranteed tuition program and the low level of state funding that the institution receives also affect the data in Tables 7 (Total Cost of Attendance) and Table 8 (Average Net Price).

Table 21: Student to Staff Ratios

As noted in the report in the text at the start of this section, the staff numbers in this table reflect all staff, regardless of function or how they are funded. There are a few issues that one should keep in mind when looking at this data to avoid misinterpretation.

The first is that increases in funding in areas not directly related to instruction (e.g., increases in research awards or public service state funds) will lead to increased staffing that has nothing to do with student headcounts. The second is that increased success in philanthropy (which funds new initiatives that need staffing) leads to an apparent "reduction" in efficiency or lower student/staff ratio.

Finally, it is very important to note that institutions make different choices about outsourcing certain functions (e.g., facilities, food service, child care) that can have significant impacts on staffing levels. For example, in the last five years, the University of Oregon has opened several residence halls with dining venues that are fully paid for with auxiliary housing and dining revenue, but whose operation increase staff and thus the institution's staff/student ratio. Many other universities outsource these functions.

Western Oregon University

We believe that this report, as mandated by the budget note and compiled by HECC, clearly demonstrates that Western Oregon University has been, and continues to be, a fiscally responsible steward of state resources. We also feel it develops a clear argument for the state, rather than to cut funding, to increase investment in higher education.

As we have seen this year, SOU was forced to declare financial exigency, and that could also become a reality for WOU if we see continued and drastic decreased funding. Enrollments have been on the decline for over a decade, and yet we have struggled to meet our student needs, provide wage increases for our employees, and serve the needs of our state. **Western Oregon University has a student body that is 82% Oregonian, 50% First-generation 27% Latino, 42% students of color, and 41% Pell eligible**. We are the first and only public four-year Hispanic Serving Institution in the state of Oregon. We don't believe the state should continue to cut resources from an institution that is doing the work Oregon states that it needs and wants done. We can perform at an even higher level if we have adequate funding. In fact, over the last decade, degree completions per $100,000 in spending increased 71.4% at Western, thus demonstrating that investment does indeed pay off.

The data compiled by HECC clearly illustrates the fiscal responsibility our university consistently demonstrates. During the last decade, Western Oregon University held operating expense growth to only 3.1%, which is below the 4.4% growth for the TRUs, 5.3% growth for public universities, the annual national average of 4.4%, and inflation of 3.6%. And WOU also achieved the best affordability rate of any public university in the same period, a 26% improvement. This point is underscored by the fact that Western held the annual average growth rate of tuition and fees to 3.2% over the last ten years, **the lowest of any public university in Oregon**. The total cost of attendance grew by only 1.5% over this period, and the average net price grew by only 0.4%, again both **the lowest rates of any public university in Oregon.**

Our staffing over the last decade has also dropped 7%; the only other public university to reduce staffing over that period is SOU. We are also better than the national average on student to staff as well as student to faculty ratios. And because 77% of our budget is personnel, we are consistently facing difficult choices in order to balance the budget. We are an economic engine that fuels Polk and Marion counties, and we provide needed opportunity for socio-economic mobility within the region. We educate people to join the workforce in needed areas. For example, we are consistently a top producer of classroom-ready teachers. The regional universities are also an incredible value for the state; our entire operating budget is around $76 million dollars, and the state funding formula provides 46% of that amount. The state investment in our university is currently around $38 million per year. To put that in perspective, the operating budget of the HECC is around $115 million.

State support per FTE at the public universities in Oregon was $11,631 at the turn of the century. Now, 25 years later, it is $9,959 (adjusted for inflation). We are also now 46th in the nation in state support for public universities. In short, we have survived a decade of scarcity, making incredibly difficult decisions to maintain fiscal viability and serve the citizens of Oregon. In the last three years, we have cut our structural deficit in half by cutting expenses and eliminating 42

FTE. To balance the budget this year, we anticipate cutting another $4 million in expenses, an act that will demand a combination of cutting student-facing services, raising tuition, and eliminating another 10-15 FTE. And this does not account for the possible reduction in our funding for this biennium.

This level of funding can't continue, and Oregon can't keep demanding that colleges provide the absolute cheapest product that can be delivered and still expect universities to keep the doors open. We are at a level that is too thin to keep cutting. Additionally, we have lost several key grants because of new federal policy and procedure changes, and we are working under the threat of attacks to institutions because of their focus on DEIA initiatives. And our benefits obligations to employees will also increase in 2027. CSL computations never take into account the actual increases in wages and benefits for employees.

This is a pivotal moment for the state, and for Western Oregon University. Your oldest public institution stands ready to continue serving our citizens. Indeed, we have been doing so without wasting funds or resources, meeting the needs of a student body that is made up of the highest percentage of first-generation students in the state. We ask that you consider what we have done and imagine what we can accomplish if we are not in a constant state of fiscal uncertainty.

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Appendix

Development Timeline

Within the HECC's budget bill (SB 5525, 2025 RS) for the 2025-27 biennium, a budget note was included regarding spending efficiency. HECC staff are directed to assess the spending and cost efficiency at the public universities using common metrics and currently available data. The commission is directed to report any findings to the Legislature in the 2026 legislative session which may include recommendations "for coordinated and collaborative efforts to reduce institutional costs and students' cost of attendance."

For timely submission to the Legislature, the resulting report will be scheduled for consideration during the December 2025 F&A subcommittee, and full commission meeting. As noted in the proposed timeline below, HECC staff will consult with partners through two rounds of feedback with the Commission retaining final editorial control.

Date	Event
Friday, August 22, 2025	HECC staff send an initial draft to partners for review
Monday, September 29	Deadline for initial feedback on draft to HECC staff
Wednesday, October 15	HECC staff provide response to feedback received
Monday, November 17	Deadline for final feedback to HECC staff
Monday, December 1	Deadline for HECC staff to finalize report for Commission
Wednesday, December 10 Thursday, December 11	HECC Subcommittee and Commission meetings
January 2026	Submission of report to Legislature

Full Text of the Budget Note

The Subcommittee recognizes the realities and cost drivers facing Oregon's public universities:

- **Growing need, declining enrollment, increasing staff**: By 2031, 72% of jobs are expected to require postsecondary education or training. A labor shortage in skilled sectors exists due to fewer college graduates. Yet, the last ten years has seen an overall decline in student enrollment, often with an increase in staffing. Because salaries and benefits are an institution's biggest expense, an increase in personnel costs without an increase in students could jeopardize a school's financial sustainability.
- **Student Support**: Universities say that part of the reason college costs are going up is because students need more support. Students also want a more personal college experience and more chances to learn outside regular classrooms. Today, more students are first generation, part-time, older, or from rural areas, and colleges need to adapt to serve them better. Oregon universities also want to improve how many students stay in school and graduate, since their retention and Completion rates are lower than the national average. To help students stay and succeed, schools are offering more tutoring,

writing and math help, food and housing support, technology services, mental health support, and staff who help raise money and build alumni networks. Because many students worry about getting a good job after college, universities have expanded career center services.

- **Grow to Compete/Survive**: Another reason costs have gone up is that when faced with funding shortfalls, schools attempted to grow their way out of the problem by opening new sources of revenue. Many launched new programs in popular areas like business and data analytics. Others increased their online offerings and opened satellite campuses. They also recruited out-of-state, including international students, who could afford to pay full price. To do all of this, colleges had to spend money – hiring more faculty and staff, advertising to attract students, offering more scholarships and tuition discounts. In going after these expansion efforts, institutions inadvertently engaged in unhealthy competition, vying for the same students, faculty, and other resources, unintentionally raising recruitment and retention costs. Experts now say this kind of growth won't solve the financial problems colleges face.
- **Federal, State, and Local Policies and Regulations**: In addition to program expansion and greater student demand for services, institutions point to the growing number of accreditation activities and government regulations for the increase in administrators and support staff. New federal policies could worsen the shift of funding reliance toward state support. Responding to potential federal efforts to withhold and reevaluate federal funding for universities could prompt institutions to hire attorneys and other professionals to stay in compliance or mitigate the impact of new policies. An anticipated wave of higher education program realignment directives will need compliance managers, consultants, and other experts to shepherd deals and manage Reorganization. Universities will need to adapt to uncertainty by continuing to manage costs and by implementing programs to improve efficiencies over time.

To inform future budgeting requests and decisions, as well as the upcoming review of the Student Success and Completion Model (SSCM) for distributing the Public University Support Fund (PUSF), the Subcommittee directs the Higher Education Coordinating Commission, in consultation with public universities listed in ORS 352.002, to assess the spending and cost efficiency at Oregon's public universities. Additionally, the commission shall use common metrics and analyze available data, including student to faculty and student to staff ratios, revenue and expenditure data, academic program growth and contractions, enrollment data, and completion rate, to identify and validate:

1) Factors contributing to changes in academic, research, student support, administrative, and facility costs;
2) Factors contributing to changes in institutional revenue levels and composition;
3) Current and projected institutional debt and debt service; and
4) Federal, state, and local regulations that can lead to financial strain on institutions.

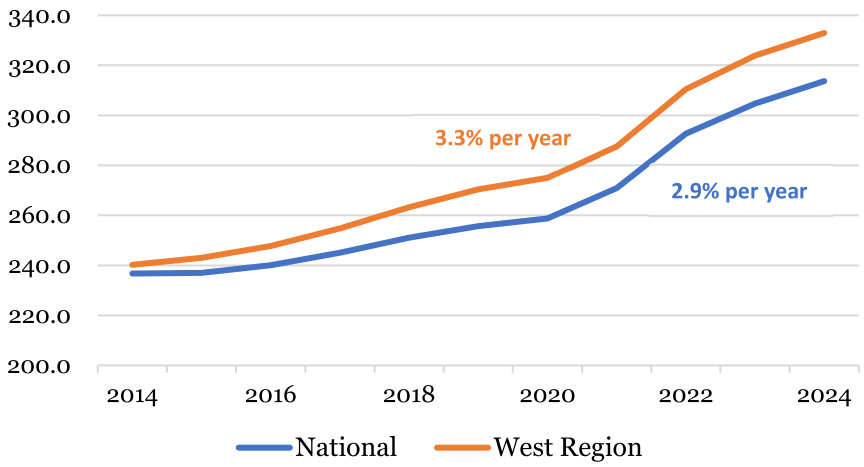
The commission may review and report on other issues related to preserving the integrity of the postsecondary experience for students while maintaining budget levels and operational strategies that ensure long-term financially sustainable for institutions. The commission is directed to report the findings of this assessment to the Joint Committee on Ways and Means in

the 2026 legislative session. The report may include recommendations for coordinated and collaborative efforts to reduce institutional costs and students' cost of attendance.

Inflation – Higher Education

Inflation is a key cost driver since it can impact many of the routine expenses faced by the universities. One perspective on inflation is the consumer price index for urban consumers (CPI-U) as reported by the U.S. Bureau of Labor Statistics. The growth in the CPI-U over time often influences wage and benefits expense growth. Figure A shows the growth in CPI-U over time for both the western region and the national average.

Figure A: CPI-U Trend



Although the year-to-year increases are similar, inflation in the western region has grown faster than the national average. As such, the general cost of living is higher in the western region of the country.

Inflation spiked to over 8.0% during the pandemic but has now fallen back to the 2.3% to 2.5% year over year range for the western region. Inflation in the western region averaged 2.3% from 2000 through 2020. With that in mind, higher inflation in the future compared to the recent historical average might lead to higher spending.

Another perspective on inflation is the Higher Education Cost Adjustment (HECA) created by the State Higher Education Executive Officers (SHEEO). It is designed to more accurately measure the inflation institutions face, largely through personnel costs which comprise 75% of the measure. The other 25% is related to general growth in services and supplies costs.

Table B includes a comparison of both inflation measures over time. The average inflation for each of the past four decades is noted along with the inflation over the past four years of the current decade. Historically, institution-based inflation (HECA) has outpaced consumer-based inflation (CPI-U). However, that trend reversed itself in the 2010's through the early 2020's;

and, during 2024, HECA has once again started to outpace consumer-based inflation. This may create upward pressure on tuition/fee rates at a time when pricing power is limited for most.

The HECA data in Table B comes from the State Higher Education Finance Survey, data adjustments file. The CPI-U data is from the U.S. Bureau of Labor Statistics for the Western Region.

Table B: Comparison of Inflation Measures

Time Period	HECA Nationally	CPI-U Western Region	Variance
1980's Average	5.5%	4.6%	0.9%
1990's Average	3.2%	3.1%	0.1%
2000's Average	3.2%	2.6%	0.6%
2010's Average	2.0%	2.1%	(0.1%)
2020 to 2021	2.8%	4.5%	(1.7%)
2021 to 2022	5.1%	8.0%	(2.9%)
2022 to 2023	4.2%	4.3%	(0.1%)
2023 to 2024	3.6%	2.8%	0.8%

Long-term Capital Liabilities and Debt Service Payments

The amount paid for debt service on capital liabilities has increased from FY2016 to FY2024 as shown in Table C with amounts noted in thousands of dollars. The data comes from the universities' annual audited financial statements, specifically the statement of cash flows. This is a key component of non-operating spending.

Table C: Debt Service Paid on Capital Liabilities

University	FY2016	FY2024	Number Variance	Percent Variance
EOU	2,787	3,243	456	16%
OIT	3,840	6,350	2,510	65%
OSU	37,055	67,497	30,442	82%
PSU	22,522	26,185	3,663	16%
SOU	4,137	4,621	484	12%
UO	76,650	68,870	(7,780)	(10%)
WOU	6,106	5,375	(731)	(12%)
Totals	**$153,097**	**$182,141**	**$29,044**	**19%**

The value of long-term, capital-related debt over time is shown in Table D with amounts noted in thousands of dollars. The data comes from the universities' annual audited financial statements, specifically the statement of net position. These numbers are limited to long-term liabilities but do not include other non-current liabilities such as pensions, OPEB, or compensatory absences.

Table D: Value of Long-Term Debt

University	FY2015	FY2024	Number Variance	Percent Variance
EOU	24,844	17,565	(7,279)	(29%)
OIT	41,136	68,899	27,763	67%
OSU	406,392	947,485	547,093	133%
PSU	256,316	168,520	(87,796)	(34%)
SOU	44,649	53,710	9,061	20%
UO	728,940	963,061	234,121	32%
WOU	57,587	39,822	(17,765)	(31%)
Totals	**$1,559,864**	**$2,259,062**	**$699,198**	**45%**

In future years, debt service payments for both the universities and the State of Oregon are summarized in Table E and noted in thousands of dollars. The universities are projected to owe a total of $3.66 billion for long-term capital liabilities. The State of Oregon will owe $2.32 billion in GF and LF funding for state-backed bonds previously issued assuming no additional projects are authorized.

The data in Table E comes from the universities' annual audited financial statements and does not include other non-current liabilities such as pensions, OPEB, or compensatory absences. State of Oregon paid debt service is for state backed bonds sold for the benefit of the public universities including GF and LF sources only as provided by the Oregon Department of Administrative Services (DAS).

Table E: Projected Debt Service

Time Period	Universities	State of Oregon
2025 – 2029	$850,538	$788,633
2030 – 2039	1,160,497	1,167,312
2040 – 2049	960,725	359,778
2050+	684,148	6,501

History of State Capital Investment and Facility Condition

During the past twenty years, the State of Oregon has authorized $3.3 billion in state-backed bonds for capital construction projects at the public universities including for the Capital Improvement and Renewal (CIR) program as noted in Table F. This includes Oregon Constitution Article XI, sections F, G, and Q bonds designated for the public universities.

Table F: State Investment by University, 2005-2025

University	Bonding Authorized
All universities (CIR)	$514,965,559
EOU	70,915,251
OIT	214,823,440
OSU – Corvallis	667,615,196
OSU – Cascades	98,053,454
PSU	636,593,410
SOU	111,351,700
UO	816,440,540
WOU	135,609,034
Total	**$3,266,367,584**

The facility condition index (FCI) is a standard metric used to assess the quality or condition of existing facilities. Measuring the FCI over time provides indication of progress in maintaining adequate facilities. The collective FCI for the public universities has improved from 20% in 2002 to the current rate of 9.8%. Lower is better with an FCI below 10% considered ideal.

Table G includes the calculated FCI (deferred maintenance / replacement value) for each public university as of Fall 2024 for education and general use facilities only. The calculation for OSU includes the Cascades campus which currently has no deferred maintenance.

Table G: Facility Condition Index by University as of Fall 2024

University	Current Replacement Value	Deferred Maintenance	FCI
EOU	507,273,354	106,685,145	21%
OIT	607,018,497	66,128,995	11%
OSU	7,075,954,703	353,279,217	5%
PSU	2,779,841,758	264,485,355	10%
SOU	615,637,654	137,580,000	22%
UO	4,201,956,800	561,425,247	13%
WOU	496,984,827	104,427,886	21%
Total	**$16,284,667,593**	**$1,594,011,844**	**9.8%**

Trend in E&G Fund Data – FY2017 to FY2025

This section summarizes financial data for the public universities over time. Revenue, expense, and fund balance information is included for the general fund, or Education and General (E&G) funds, only. Key takeaways are summarized with additional details in Table H.

Revenues

- Gross tuition and fee revenue, across all students, has grown on average annually by 3.7%. However, remissions (i.e., institutional financial aid) have grown on average by 11% per year more than doubling to $257 million by FY2025 with the remissions rate increasing to 16%. Net tuition and fee revenue totals $1.3 billion in FY2025 and makes up 64% of all revenues.
- Total revenue has also grown on average annually by 3.6%.
- State appropriations have grown on average annually by 5.4%. Collectively state funding makes up 26% of revenue.

Expenses

- Spending for wages and healthcare has grown annually by 3.5% and 3.6% respectively while retirement contributions have grown annually by 6.9%. Personnel costs make up 77% of all spending.
- Spending for services and supplies has grown 4.5% per year and now makes up 18% of all spending. Growth can be attributed to increases for insurance, technology, and other support costs.
- Total spending has grown on average annually by 4.0%.

Impact on Fund Balances

- Collectively, the fund balance has grown $89 million (34%) to a total of $353 million by the close of FY2025. However, this represents the same 17% of total revenue in FY2025 as it did in FY2017.
- The universities have two months of reserves, compared to a recommended two and half, meaning they could continue operating for two months without additional revenue. This varies significantly by university. One of them has less than one month of reserves.

Key Takeaways

1. The growth in spending has been outpacing the growth in revenue. This creates difficulty in maintaining a balanced budget and diminishes financial sustainability.
2. The magnitude of this trend was masked by the pandemic. During FY2021 spending dropped 5% while revenue declined 0.6%. However, in the four years since, spending has grown 6.6% annually while revenues have grown 4.9% annually reducing the collective fund balance by $47.2 million or 12%.
3. As a result, the governing boards are grappling with a structural mismatch between spending growth and revenue growth necessitating informed discussions in collaboration with communities served to create a stable operating environment.

Table H: General Fund (E&G) Financial Data
Public Universities

	FY2017	FY2018	FY2019	FY2020	FY2021	FY2022	FY2023	FY2024	FY2025	Annual Growth
Revenues										
Gross tuition and fees	1,201,446,133	1,251,167,441	1,270,152,082	1,300,342,840	1,296,856,539	1,342,845,391	1,415,969,337	1,499,415,508	1,602,740,921	3.7%
Less fee remissions	(114,448,125)	(123,088,477)	(123,439,261)	(138,448,560)	(157,580,060)	(176,669,722)	(202,982,083)	(229,384,299)	(257,173,326)	10.7%
Net tuition	**1,086,998,008**	**1,128,078,964**	**1,146,712,820**	**1,161,894,280**	**1,139,276,478**	**1,166,175,669**	**1,212,987,254**	**1,270,031,209**	**1,345,567,595**	**2.7%**
State operating funding	**361,177,677**	**381,652,848**	**399,808,055**	**432,431,227**	**449,419,853**	**475,571,984**	**491,535,932**	**534,414,538**	**549,451,464**	**5.4%**
State paid debt service	5,534,828	5,411,824	5,388,827	5,388,824	5,388,824	5,338,579	5,338,578	5,338,579	5,338,579	-0.5%
Indirect cost recovery	72,633,560	76,807,595	79,161,917	80,213,592	81,774,258	88,600,693	101,478,559	107,849,437	114,182,741	5.8%
All other	69,355,688	64,275,864	81,625,755	75,461,136	69,421,783	66,070,052	88,792,052	111,321,160	102,136,907	5.0%
Total revenues	**1,595,699,762**	**1,656,227,095**	**1,712,697,374**	**1,755,389,059**	**1,745,281,196**	**1,801,756,977**	**1,900,132,375**	**2,028,954,923**	**2,116,677,286**	**3.6%**
Year-to-Year growth:		3.8%	3.4%	2.5%	-0.6%	3.2%	5.5%	6.8%	4.3%	
Expenses										
Salary & Wages	808,406,796	822,824,466	871,831,110	890,818,858	864,873,287	917,857,435	946,689,642	1,018,815,075	1,067,032,550	3.5%
Benefits: Health	158,944,167	111,480,094	172,208,555	179,678,039	182,732,303	174,033,187	187,700,248	201,851,495	210,979,899	3.6%
Benefits: Retirement	138,464,703	113,456,420	168,850,231	192,359,317	189,309,615	197,758,049	203,353,176	226,755,136	236,565,878	6.9%
Benefits: Other	109,468,222	230,808,179	116,574,878	122,363,471	121,991,123	115,531,792	123,886,115	137,071,608	135,212,385	2.7%
Supplies & Services	273,402,133	286,085,803	318,490,242	305,093,641	285,876,400	330,013,664	368,234,925	389,430,975	389,392,630	4.5%
Capital Expenditures	17,737,592	12,968,626	19,032,960	14,110,275	11,856,657	11,783,339	13,623,232	16,572,827	13,930,538	-3.0%
Institutional Student Aid	5,605,044	7,022,677	8,302,280	8,493,745	8,034,353	7,459,273	8,520,429	9,399,873	8,991,792	6.1%
Net Fund Transfers	53,902,073	49,189,034	45,701,659	35,912,669	(4,076,797)	9,990,339	46,855,961	50,392,354	80,030,535	5.1%
Total expenses	**1,565,930,731**	**1,633,835,299**	**1,720,991,917**	**1,748,830,016**	**1,660,596,940**	**1,764,427,078**	**1,898,863,729**	**2,050,289,342**	**2,142,136,207**	**4.0%**
Year-to-Year growth:		4.3%	5.3%	1.6%	-5.0%	6.3%	7.6%	8.0%	4.5%	
Net Income (Loss)	**29,769,031**	**22,391,796**	**(8,294,543)**	**6,559,043**	**84,684,255**	**37,329,899**	**1,268,646**	**(21,334,419)**	**(25,458,921)**	
As a % of Revenue	2%	1%	0%	0%	5%	2%	0%	-1%	-1%	
Fund Balance Information										
Beginning Fund Balance	231,836,084	263,964,589	282,130,328	271,457,189	276,955,177	361,350,044	400,206,892	401,079,907	378,614,011	
Additions/Deductions	2,359,474	(4,226,057)	(2,378,596)	(1,061,054)	(289,388)	1,526,949	(395,632)	(1,131,477)	(197,568)	
Ending Fund Balance	**263,964,589**	**282,130,328**	**271,457,189**	**276,955,177**	**361,350,044**	**400,206,892**	**401,079,907**	**378,614,011**	**352,957,522**	
Balance as a % of Revenue	17%	17%	16%	16%	21%	22%	21%	19%	17%	
Months of Operating Balance	2.0	2.0	1.9	1.9	2.5	2.7	2.5	2.2	2.0	
Additional Information										
% of Revenue that is Tuition	68%	68%	67%	66%	65%	65%	64%	63%	64%	
% of Revenue that is State	23%	23%	24%	25%	26%	27%	26%	27%	26%	
Remission Rate	10%	10%	10%	11%	12%	13%	14%	15%	16%	
Wages/Benefits, % of Total:	78%	78%	77%	79%	82%	80%	77%	77%	77%	
S&S as % of Total:	17%	18%	19%	17%	17%	19%	19%	19%	18%	

FY2026 E&G Budget Summary

The FY2026 E&G fund budgets for the public universities covering academic year 2025-26 are summarized below. This includes the year-to-year trend in enrollment, tuition/fee revenue, total revenues, and total expenses along with the projected impact on the fund balance. These budgets may continue to change over time.

FY2026 E&G Budgets							
Annual Change:	**EOU**	**OIT**	**OSU**	**PSU**	**SOU**	**UO**	**WOU**
Enrollment	(3.7%)	2.9%	2.5%	(2.3%)	(1.8%)	0.9%	(3.4%)
Net Tuition and Fee Revenue	4.0%	4.9%	11.1%	5.5%	3.2%	2.6%	0.2%
Total Revenue	0.6%	2.5%	5.9%	(1.4%)	4.1%	2.5%	(0.1%)
Total Expense (and net transfers)	5.8%	3.3%	3.9%	-0-	(4.1%)	3.6%	2.9%
Additional Data:							
Operating Gain (Loss)	($0.6M) (1.1%)	-0-	($3.7M) (0.4%)	($10M) (2.9%)	($1.8M) (2.8%)	($2.0M) (0.3%)	($4.1M) (5.7%)
Ending Fund Balance (months)	$10.1M 2.2	$15.4M 2.4	$99.5M 1.4	$82M 2.9	($4.1M) (0.8)	$117.6M 2.0	$9.5M 1.6
% of Revenue from State	47%	49%	23%	37%	45%	15%	48%

The following should be noted for this data: The enrollment trend is full-time equivalent from fall 2024 to fall 2025. The operating gain (loss) is expressed as a percentage of total revenues. The ending fund balance is expressed as months of revenue. The financial data comes from the annual E&G survey conducted by HECC staff except for UO whose data comes from December 2025 board materials.

Key Takeaways

1. The trend in fall enrollment year over year is negative for four of the universities.
2. Spending growth in total varies widely with growth in personnel costs making up most of the increase. Services & supplies increases are generally for insurance, utilities, and contractors.
3. Six of the universities are projecting an operating loss for FY2026 with spending growth outpacing revenue growth. Granted, the universities are taking action to close these budget gaps as much as possible throughout the year. This leaves fund balances further diminished with all but one below a generally accepted standard.

Projections – FY2027 and Beyond

This section provides a forecast for the collective E&G fund based on assumed year-to-year changes by category. This information is intended to support a policy conversation and should not be used for any other purpose. Key assumptions are noted with details in Table I while key takeaways are noted with details in Table J.

Broader Trends

The broader trends that inform these projections are outlined in the report titled, *Financial Sustainability of Oregon Public Universities, 2025*. These include:

- Enrollment headwinds and demand uncertainty will continue to suppress revenue. Improving persistence rates may help, but it is unlikely sustainability will be achieved through program expansion and enrollment growth of traditionally aged learners.
- Balancing expenses with available revenue will continue to be a struggle. A trend masked by the pandemic that necessitates challenging the status quo.
- Recent increases in state funding are having a positive impact on student affordability. However, growth in state funding going forward will likely lag its recent trend.
- Potential, additional costs lurk outside primary expense drivers due to extraordinary federal policy uncertainty and other factors.

Key Assumptions

Based on the trends noted, the forecast focuses on five key assumptions including gross tuition/fee revenue, remissions, state funding, wages, and PERS contributions. These include:

- Gross tuition and fee revenue is expected to grow 4.0 – 4.5% annually which is higher than projected consumer-based inflation of 3.0 – 3.5%.
- The remissions rate is expected to continue at 15% of gross tuition/fee revenue.
- State funding is expected to grow 3.5 – 4.5% annually, which is lower than the past decade. Granted, this may be less likely given the state's revenue forecast. Table K includes historical information on state funding for higher education.
- Wages are assumed to grow at a rate consistent with that projected by DAS for state employees including 7.25% for FY2027 and 4.5% annually thereafter.
- PERS contributions are expected to grow at 7.0 – 7.5% annually, which is similar to the recent past, based on plan adjustments and side account contributions.

Key Takeaways

1. With the assumptions noted, spending continues to exceed available revenue. If that continues, fund balances will be exhausted in 3 to 4 years. Granted, one will have to cut spending by at least 4.5% *this year* to avoid exhausting its fund balance.
2. Even under a more generous revenue scenario, with state funding growth at the recent annual average of 5.5 – 6.0%, a structural gap persists. Alternatively, with state funding growth at 5.5 – 6.0% and gross tuition/fee revenue growth at the recent pace of 6.0 – 6.5% with a 15% remission rate, the gap closes. However, the likelihood of that is low given the demographic, student affordability, and state revenue pressures expected.
3. It is difficult to see how financial sustainability will be achieved in the future without improved spending efficiency. Yet, the changes needed to accomplish that will likely face significant cultural push back due to rigid labor models.

Table I: Assumptions Used in Forecast

Component	Rate	Notes
Revenues:		
Gross tuition and fees	**4.5%**	**annual growth based on adjusted historical average** Pre-pandemic (FY2017 to FY2020) average was 2.7%; post-pandemic (FY2022 to FY2025) was 5.4%, 3.6% is the avg since FY2017; however, inflation is expected to be around 3.0-3.5% with T/F about 1.0-1.5% higher than CPI. This assumes little to no enrollment growth or decline and is likely at the top end of price growth potential. This includes all student types (i.e., UG, grad, resident, non-resident) and all fees (i.e., mandatory and otherwise).
Remissions	**15.0%**	**percent of gross T/F revenue based on current remission rate** The universities have increased this rate from 10% to 15% since FY2017; assumes no further growth in the rate itself, although the total number of dollars available for remissions will growth with gross T/F revenue growth.
State operating funding	**3.5%**	**annual growth based on current CSL; historical is 5.5%** State funding has been growing abnormally higher over the past decade; but with more state funding committed to healthcare, natural resources, and other areas in the recent past, funding for higher education may grow at a lower rate. Essentially this assumes the current biennium to biennium growth continues based on the current revenue forecast.
State debt service	-0.5%	Annual decline based on historical average; this is SELP and should decline as those arrangements mature.
Indirect cost recovery	4.1%	Based on growth in general inflation. Assumes grant funding will continue, which may be impacted by federal policy.
All other revenue	3.0%	Based on historical growth in this category.
Expenses:		
Salary & Wages	**4.5%**	**7.25% growth for FY2027; annual growth thereafter based on DAS budget instructions (for state employees)**
Benefits: Health	3.7%	annual growth based on historical average
Benefits: Retirement	**7.0%**	**annual growth adjusted for assumed reduction due to PERS changes; historical is 7.6%; recent three-year trend is 8.1%.**
Benefits: Other	13.3%	percentage of salary & wages based on historcial average
Supplies & Services	4.1%	annual growth based on general inflation included in DAS budget instructions
Capital Expenditures	0.1%	growth based on historical average
Institutional Student Aid	4.5%	annual growth based on growth of gross tuition/fee revenue
Net Fund Transfers	0.5%	annual growth based on historical average
Fund balance adjustments		Assuming no adjustments.

Notes:
The key drivers of both revenues and expenses are bolded. These are key assumptions.
The DAS Budget Instructions referenced are: 2025 Budget & LC instructions, DAS CFO, March 2024, p 48.

Table J: Forecasted General Fund (E&G) Financial Data

Public Universities

	FY2025	FY2026e	Assumed Rate:	FY2027e	FY2028e	FY2029e	FY2030e	FY2031e	Annual Growth
Revenues									
Gross tuition and fees	1,602,740,921	1,698,204,847	4.5%	1,774,624,065	1,854,482,148	1,937,933,845	2,025,140,868	2,116,272,207	4.7%
Less fee remissions	(257,173,326)	(267,755,644)	15.0%	(266,193,610)	(278,172,322)	(290,690,077)	(303,771,130)	(317,440,831)	3.6%
Net tuition	**1,345,567,595**	**1,430,449,203**		**1,508,430,455**	**1,576,309,826**	**1,647,243,768**	**1,721,369,738**	**1,798,831,376**	**5.0%**
State operating appropriations	**549,451,464**	**552,312,207**	**3.5%**	**571,643,134**	**591,650,644**	**612,358,416**	**633,790,961**	**655,973,645**	**3.0%**
State debt service appropriations	5,338,579	4,959,331	-0.5%	4,934,534	4,909,862	4,885,312	4,860,886	4,836,581	-1.6%
Indirect cost recovery	114,182,741	100,587,478	4.1%	104,711,565	109,004,739	113,473,933	118,126,364	122,969,545	1.2%
All other	102,136,907	92,829,488	3.0%	95,614,373	98,482,804	101,437,288	104,480,407	107,614,819	0.9%
Total revenues	**2,116,677,286**	**2,181,137,707**		**2,285,334,061**	**2,380,357,874**	**2,479,398,718**	**2,582,628,355**	**2,690,225,966**	**4.1%**
Expenses									
Salary & Wages	1,067,032,550	1,121,281,165	4.5%	1,171,738,817	1,224,467,064	1,279,568,082	1,337,148,646	1,397,320,335	4.6%
Benefits: Health	210,979,899	217,776,711	3.7%	225,834,450	234,190,324	242,855,366	251,841,015	261,159,132	3.6%
Benefits: Retirement	236,565,878	267,181,320	7.0%	285,884,012	305,895,893	327,308,605	350,220,208	374,735,622	8.0%
Benefits: Other	135,212,385	137,814,416	13.3%	156,143,734	176,910,850	200,439,993	227,098,512	257,302,615	11.3%
Supplies & Services	389,392,630	405,008,149	4.1%	421,613,483	438,899,636	456,894,521	475,627,197	495,127,912	4.1%
Capital Expenditures	13,930,538	13,908,921	0.1%	13,922,830	13,936,753	13,950,690	13,964,640	13,978,605	0.1%
Institutional Student Aid	8,991,792	8,597,356	4.5%	8,984,237	9,388,528	9,811,012	10,252,507	10,713,870	3.0%
Net Fund Transfers	80,030,535	34,348,937	0.5%	34,520,682	34,693,285	34,866,752	35,041,085	35,216,291	-12.8%
Total expenses	**2,142,136,207**	**2,205,916,976**		**2,318,642,245**	**2,438,382,334**	**2,565,695,021**	**2,701,193,810**	**2,845,554,381**	**4.8%**
Net Income (Loss)	**(25,458,921)**	**(24,779,269)**		**(33,308,184)**	**(58,024,459)**	**(86,296,303)**	**(118,565,455)**	**(155,328,416)**	
As a % of Revenue	-1%	-1%		-1%	-2%	-3%	-5%	-6%	
Fund Balance Information									
Beginning Fund Balance	378,614,011	352,957,522		324,020,558	290,712,374	232,687,914	146,391,611	27,826,157	
Additions/Deductions	(197,568)	(4,157,696)		-	-	-	-	-	
Ending Fund Balance	**352,957,522**	**324,020,558**		**290,712,374**	**232,687,914**	**146,391,611**	**27,826,157**	**(127,502,259)**	
Balance as a % of Revenue	17%	15%		13%	10%	6%	1%	-5%	
Months of Operating Balance	2.0	1.8		1.5	1.2	0.7	0.1	(0.6)	

Notes:

FY2025 and FY2026 numbers above are from the universities from the annual E&G survey conducted by HECC staff.

Years FY2027 and beyond are projected using the assumed rates noted.

Table K: Oregon State Budget over Time

General and Lottery Funds ($ in Millions)

Funding by Program Area:	2009-11 Actuals	2011-13 Actuals	2013-15 Actuals	2015-17 Actuals	2017-19 Actuals	2019-21 Actuals	2021-23 Actuals	2023-25 Legislatively Approved	2025-27 Legislatively Adopted	Variance, 25-27 to 09-11	
K-12 Education	5,728.1	6,072.5	7,163.1	7,974.6	8,919.5	9,269.5	9,671.6	10,732.9	12,115.2	6,387.1	112%
Postsecondary Education	1,407.6	1,281.1	1,473.9	1,805.1	2,036.9	2,296.8	2,787.4	3,129.2	3,343.3	1,935.7	138%
Human Services	3,294.1	3,888.5	4,276.6	4,888.8	5,317.4	6,084.1	7,671.5	12,120.0	13,824.8	10,530.7	320%
Public Safety	1,785.2	1,959.5	2,128.5	2,368.6	2,582.5	2,794.7	2,713.7	4,371.3	4,864.5	3,079.3	172%
Judicial and Legislative Branch	566.1	673.2	734.2	806.6	874.4	1,007.6	1,012.7	1,038.9	1,154.0	587.9	104%
General Government	753.6	784.0	884.0	988.5	1,207.3	1,949.2	3,944.7	3,646.1	3,035.0	2,281.4	303%
Total	**$13,534.7**	**$14,658.8**	**$16,660.3**	**$18,832.2**	**$20,938.0**	**$23,401.9**	**$27,801.6**	**$ 35,038.4**	**$ 38,336.8**	**$ 24,802.1**	**183%**
Biennial growth for Postsecondary:		-9%	15%	22%	13%	13%	21%	12%	7%		
Biennial growth in funding for Total:		8%	14%	13%	11%	12%	19%	26%	9%		
Proportional Share:											
K-12 Education	42.3%	41.4%	43.0%	42.3%	42.6%	39.6%	34.8%	30.6%	31.6%		
Postsecondary Education	10.4%	8.7%	8.8%	9.6%	9.7%	9.8%	10.0%	8.9%	8.7%		
Human Services	24.3%	26.5%	25.7%	26.0%	25.4%	26.0%	27.6%	34.6%	36.1%		
Public Safety	13.2%	13.4%	12.8%	12.6%	12.3%	11.9%	9.8%	12.5%	12.7%		
Judicial and Legislative Branch	4.2%	4.6%	4.4%	4.3%	4.2%	4.3%	3.6%	3.0%	3.0%		
General Government	5.6%	5.3%	5.3%	5.2%	5.8%	8.3%	14.2%	10.4%	7.9%		

Source:

2025-27 Budget Highlights, LFO, October 2025, page 9. For 2021-23, 2023-25, and 2025-27.
2023-25 Budget Highlights, LFO, September 2023, page 9. For 2019-21.
2021-23 Budget Highlights, LFO, March 2022, page 5. For 2017-19.
2019-21 Budget Highlights, LFO, September 2019, page 6. For 2015-17.
2017-19 Budget Highlights, LFO, September 2017, page 7. For 2013-15.
2015-17 Budget Highlights, LFO, September 2015, page 6. For 2011-13.
2013-15 Budget Highlights, LFO, September 2013, page 6. For 2009-11.

Growth in:	Total State	Higher Ed
FY2015	$ 9,416.10	$ 902.55
FY2024	$ 17,519.20	$ 1,564.60
Annual Growth Rate:		
	7.1%	**6.3%**

Notes:

The trend in funding for K-12 is affected by the exclusion of other funds like student success and federal funding.
General Government includes economic development, natural resources, transportation, consumer/business services, and administration.
2025-27 does not include $801.2 million in the emergency fund.

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EXHIBIT E
OREGON POSTSECONDARY EDUCATION SYSTEM STUDY

SEE ATTACHED

Docket Item: – Oregon Postsecondary Education System Study (HB 4124) Implementation Update

Summary

HB 4124, sponsored by Rep. Pam Marsh and passed with bipartisan support during the 2026 legislative session, presents HECC with a large and consequential new task to undertake over the next year.

The bill directs the HECC to study the condition of Oregon's postsecondary education system and develop recommendations for an improved framework that supports access to postsecondary education institutions for students across geographic locations; fuels regional and statewide economic development and employment opportunities; and improves the financial viability of each postsecondary institution and the system as a whole by addressing factors like enrollment, increased personnel costs, changes in federal law, and sector-specific inflationary costs.

The study must evaluate the distinct missions of each category of postsecondary institution and opportunities for collaboration, restructuring, or integration in the postsecondary system. HECC is required to consult with faculty, staff, students, and other public institution partners in the development of the report, and must preliminarily report to the Legislature by October 1, 2026, and submit a final report by April 1, 2027.

While legislators' reasons for supporting HB 4124 varied, perhaps the most widespread rationale is captured in the following clauses from the bill's introduction:

> "Whereas after about a decade of operations, Oregon must reevaluate the accessibility, financial resiliency, efficiency, effectiveness and coordination of its post-secondary education system to ensure the system meets the diverse needs of Oregon's students, economy and workforce; and
>
> "Whereas recent, current and projected demographic, enrollment and market conditions and trends coupled with the competitive landscape for post-secondary education institutions, including the effects of online and out-of-state programs, require Oregon institutions to strategically assess financial and enrollment sustainability."

In recognition of the magnitude of the task and the limited capacity of HECC staff to undertake new work, the Legislature appropriated $2.5 M for HECC to engage third-party contractors to support the project.

Initially, HECC has contracted with Oregon Consensus[1] to conduct an assessment that will inform the approach that HECC takes to the project. Oregon Consensus has begun to conduct interviews and focus groups with interested parties including community college and university leaders, faculty, staff, students, unions, employers, tribal, and community leaders. Their assessment will attempt to answer questions such as: What should be the project's guiding principles? What additional consulting support should HECC seek? Who should sit at a project leadership table? How should other interested parties be able to participate? What relational dynamics may hinder/foster alignment between parties throughout the project? The answers to these questions will help inform HECC's subsequent process.

By summer 2026, HECC intends to engage a contractor (or contractors) that will conduct the bulk of the project, including outreach, communications, data-gathering, analysis, and recommendations. In addition, we expect to establish a project leadership table that includes representatives of interested parties and will be facilitated by an external entity. This group will receive regular updates on the project, advise HECC staff on guiding the consultant(s) work, and attempt to forge areas of alignment with – and acknowledge areas of deviation from -- the consultants' perspectives and recommendations.

While the Commission will take final responsibility for the contents of interim and final reports to the Legislature that meet the requirements of HB 4124, we hope that this process builds shared understanding amongst Oregon's diverse education constituencies about challenges and opportunities facing higher education.

Lastly, what follows is a list of draft principles to guide the project. Oregon Consensus is inviting its interviewees to reflect on and respond to this list; the Commission is likewise encouraged to do so. Once finalized, these principles should help inform and guide project leadership.

(DRAFT) We are committed to:

- Building on what's come before. This includes the NCHEMS study for OPU/OPC and the HECC's recent university efficiency/spending report.
- Learning from others. We will be informed by a broad, national perspective on the challenges faced in higher education and potential models to follow (and to

[1] Oregon Consensus exists in statute as the State of Oregon's program for public policy conflict resolution and collaborative governance. The program provides mediation and other collaborative services to public bodies and other interested parties who are seeking agreement seeking/collaborative approaches to challenging public issues. Oregon Consensus conducts assessments and, where appropriate, designs and facilitates impartial and transparent collaborative processes that foster equitable participation and durable agreements.

avoid).
- Inclusion. Faculty, staff, students, governing boards, unions, institutional administrators, tribal governments, community leaders, and legislators should have meaningful opportunities to help shape the process and the recommendations.
- Transparency. Interested parties should receive frequent communication about the project.
- Focusing on student and community needs. The primary lenses for analysis and decision-making should be the needs of students (access to impactful education) and the state and its regions (economy, workforce, civic vitality).
- Protecting institutional diversity. To meet the needs of diverse students, including race/ethnicity, age, and urban/rural, one size will not fit all.
- Good data. We should draw from data that is well-accepted and standardized to the greatest extent possible.
- Being realistic and working within the parameters that the Legislature established in HB 4124, even when it's uncomfortable. Recommendations should promote student access, economic and workforce opportunities, and the financial viability of institutions/systems without relying on major increases to public funding.
- A decision-making process that attempts to establish areas of high alignment between interested parties, but also reflects that HECC will be responsible for final recommendations to the Legislature.

Commissioners can expect regular staff updates on this project during the remainder of 2026 and early 2027, with opportunities to reflect on findings and emerging recommendations before they are brought to the Commission for final approval.

Staff Recommendation
This item is for informational purposes.

EXHIBIT F
OREGON HIGHER EDUCATION LANDSCAPE STUDY

SEE ATTACHED

Oregon Higher Education Landscape Study

National Center for Higher Education Management Systems

September 23, 2022

Prepared for the Oregon Council of Presidents and the Oregon Community College Association

Executive Summary

Oregon is faced with many problems that require public investment if those problems are to be successfully addressed and how thriving the state will be in the future. Among the most pressing issues are transportation, the provision of social services, stewardship of the environment and the reduction of contributions to global warming, provision of a health care safety net for a rapidly aging population, public safety, and enhanced economic opportunity for its communities among them. There will inevitably be increased demands on the public purse—this in a state where the per capita income is below the national average, where income taxes are the primary source of state revenues, and where there is little appetite for increasing tax rates to pay for needed services. The way out of this dilemma is to increase the income tax base of the state—to increase the numbers of workers in the state who have high-paying jobs. The state's past focus on workforce development is commendable and its current emphasis on closing equity gaps is both moral and essential in a rapidly diversifying population. As important as these efforts are, they mostly focus on restocking and diversifying the workforce for the current shape of Oregon's economy—the workforce needed to fill the existing mix jobs that have so far left Oregon below the national average in per capita income. Oregon badly needs to invest, not just in workforce development, but also in work*place* development; it needs to invest in activities that will create the jobs of the future. The state's colleges and universities are the engines that will fuel such developments. Other states that have drawn this conclusion have mounted a sustained effort to leverage the public colleges and universities; many of these are threatening to leave Oregon increasingly behind.

This report presents data that demonstrate that:

- Oregon's public institutions are caught in a financial bind. They must either grow enrollments or increase tuition revenue, or both, to meet rising educational costs that, because of rapidly rising personnel costs (especially benefits), are not entirely within their control. In comparison to other states, Oregon underinvests in higher education; this is particularly the case in its funding of four-year institutions. Worse, demographic decline among traditional college-age students will cause this bind to become more constricting, and the combination of these factors will intensify the competition among the institutions in a manner that hinders the state's ability to achieve its goals for postsecondary education related to attainment, equity, and affordability.
- With respect to demographic changes, the state will experience a rapidly aging population; the number of young people graduating from high school is projected to remain essentially stable over the next 15 years. Conditions in states from which Oregon universities recruit out-of-state students are even more discouraging. The numbers of high school graduates in these states are projected to decrease substantially. The only avenue through which Oregon colleges and universities can (slightly) grow enrollments is to improve the proportion of high school students who graduate from high school and to increase the college participation rates of both high school graduates and adults, both areas where Oregon lags the country and where there is room for improvement. But the bottom line is that tuition revenues alone will not pay for the investments needed to create a better Oregon.

- The high reliance on tuition to fund the state's higher education enterprise makes maintaining affordability for students a key state priority—it is in the state's best interest to ensure that students of all types can afford to go to college and stay in college long enough to complete a program of study. The evidence presented in this report indicates that the existing state student aid programs are generally well designed to meet the needs of recent high school graduates. However, they do not meet the needs of adults returning to college, often on a part-time basis. This is a population that must be better served in order to achieve a better Oregon.
- A better Oregon must also be a more equitable Oregon. Social justice demands that the playing field be leveled and that students from marginalized populations be given the assistance they need to reap the benefits accorded to their more advantaged peers. Beyond the moral imperative, the economic future of the state depends on this population of students becoming better educated. With the large cohort of older Oregonians aging out of the workforce, employers will need an infusion of new, skilled workers. Those workers will have to come from a population that is increasingly diverse. The success of underrepresented students will be key to the success of Oregon employers.
- Oregon also depends on individuals who come to Oregon from other states. Major contributors to this inflow of talent are Oregon's public institutions, which educate students from other states who, after graduation, stay in the state to work. There is scant recognition of the importance of these individuals to the workforce development needs of the state, nor of the roles that colleges and universities play in "recruiting" these workers to the state. A comprehensive workforce development strategy should redress this failure.
- Oregon is lingering in a natural resource and industrial age-based economic model. With few exceptions, it has not evolved to being a technology-based economy. While the political rhetoric reflects a desire to move in that direction, the concrete actions needed to put the state on a trajectory that would yield these results are, for the most part, not being taken. There is no statewide economic development plan that would point the way to the necessary capacity-building. The strategic plan created by the state's Higher Education Coordinating Commission (HECC) establishes some priorities from the perspective of a higher education agency, but it is not a substitute for a plan that provides guidance regarding the future of the state.
- Colleges and universities are the state's greatest assets upon which to build the new and better Oregon. But it will take more investment—and more targeted investment than the state has heretofore been willing to make. Community colleges are a key provider of the workforce for established employers and are well known for their ability to rapidly respond to evolving workforce needs. In particular, it will require making college affordable for the many older, part-time students who make up a large portion of community college enrollments. Meanwhile, the state's universities, particularly the research universities, must be central players in creating the state's new economy, and they require adequate support and appropriate, well-coordinated priming and inducements to do so. The evidence provided in this report indicates that the research infrastructure in fields key to economic development is insufficient.

- Colleges and universities will have to put skin in the game, principally by engaging in collaborative activities—both administrative and academic—that will produce better service at lower cost. The conversations held during the course of this project revealed a reservoir of willingness among institutions to engage in such activities (and numerous examples of on-going collaborative activities), but also a lack of the infrastructure necessary to make collaborating both easier and more worthwhile for participants than it currently is. Obtaining the full benefits from collaborative efforts will require an active state role in convening potential participants (a role that could be played by HECC) and state support to cover some of the start-up costs.

With these observations in mind, this report points to actions that the state and its public institutions can take that will put the state's higher education assets in a strong position to contribute to achieving these broader statewide and societal goals. These actions include:

- Taking steps to ensure that the state's policy leaders and its institutions of higher education are pursuing a common and widely agreed upon set of priorities for improving the economy and quality of life for the benefit of the residents of Oregon
- Continuing the emphasis on achieving equity in access to postsecondary education and in the success of students.
- Investing in creating the institutional infrastructure (new educational programs, research capacity, etc.) needed to achieve these goals.
- Rebalancing the funding responsibilities for higher education in the state so that the students pay a smaller share and the state a larger share.
- Better linking allocation of resources to state goals.
- Ensuring that affordability for students is enhanced—not just for recent high school graduates, but for part-time adult students as well.
- Improving the efficiency with which programs are delivered and institutions are operated. Particular emphasis should be placed on sharing of services to accomplish this objective.

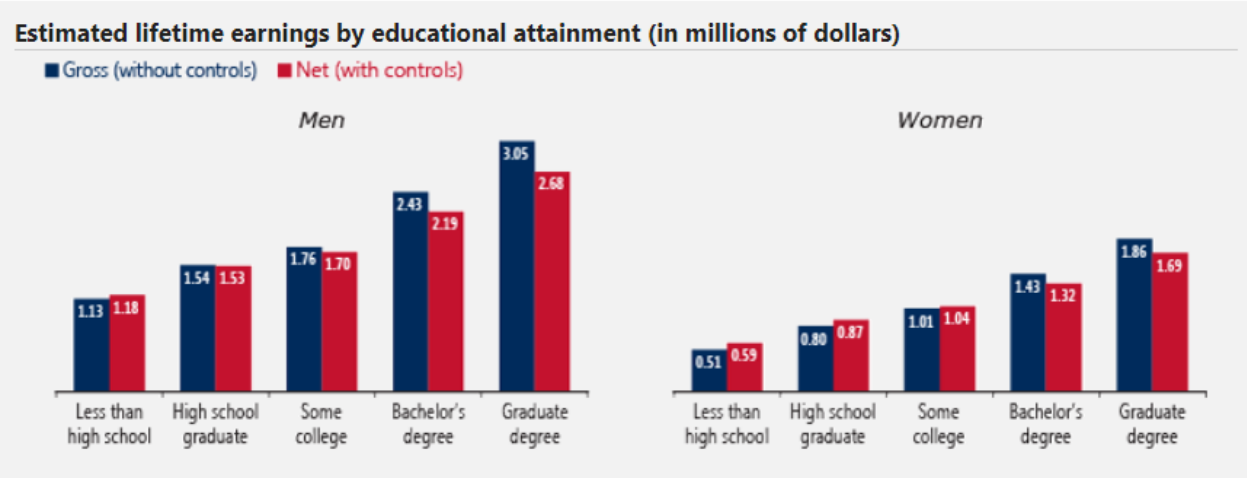
Introduction

Oregon, like many other states, is facing a series of problems that are converging to threaten the economic fortunes and the quality of life of its residents—a partial list includes a weakening of civil society, economic bifurcation, persistent gaps in opportunity (across varied dimensions such as race/ethnicity, urban/rural settings, income), a growing climate crisis, a rapidly aging population and its implications for an available workforce, and competition from other states and nations in the arenas on which the state's economy rests. While the specifics may differ, no state is immune from a litany of similar problems demanding attention, and many of them are floundering in search of solutions. A very few—Tennessee, Kentucky, and Virginia among them—have taken steps to more systematically address their major societal challenges. Their actions start with a clear-eyed understanding of the problems they face and an effort to build consensus around the importance of addressing those problems, then focusing the major assets and tools available to state government on developing and implementing solutions. Notable among the assets deployed in each instance of a successful and innovative state response has been the state's public colleges and universities. These institutions have been recognized for the central—and unmatched—role they play in preparing the skilled workforce needed to meet the demands of a competitive economy; in expanding and diversifying the economy through R&D activities that yield new products and services; in developing new ways to attack bedeviling problems such as persistent inequality and challenges to public health and the environment; and in providing opportunities to individuals that help them become socially mobile. Key to progress in all instances has been leadership of elected officials who have used their bully pulpit to draw attention to the handful of key issues, consistent attention to the issues over a long period of time, and wise investments of state resources (primarily to education) to create and sustain the necessary capacity to provide the sought-for benefits.

Oregon has periodically demonstrated the capacity to develop and enact a future-oriented statewide vision, one that connects the state's success in stimulating improvements in residents' quality-of-life and in living out core values such as environmental stewardship. New investments in transportation infrastructure and reform in land use policies and practices over the past decades are examples where questions about the kind of state Oregon wants to be, posed by diverse stakeholders including business and the media, led to creative and Oregon-specific solutions that spurred changes to move the state closer to realizing that vision. Higher education, particularly the state's investment in its public institutions (and in financial aid that supports its private institutions as well), is a vital ingredient to Oregon's future. It is timely for the state to muster the political will to shape a transformative vision for Oregon's competitive future—a vision that, by necessity, effectively leverages the vast capacity of the state's higher education assets in its achievement. At the same time, Oregon's higher education institutions have a role to play in driving innovation both within their own operations, across institutional boundaries, and beyond to better serve students; in recognizing their fellow institutions strengths and collaborating with them to meet public needs; and in elevating relevance in their services to students, their communities, and the state.

The arguments in favor of deliberately harnessing Oregon's public colleges and universities, with attendant investments, to achieve this vision are clear and indisputable. The benefits of an educated citizenry to both individuals and the larger society are well established. Individuals with education beyond high school have considerably higher incomes than those who have not earned a college degree or obtained an industry-recognized certification (Figure 1). More highly educated individuals enjoy the many qualities of life benefits that are associated with higher incomes.

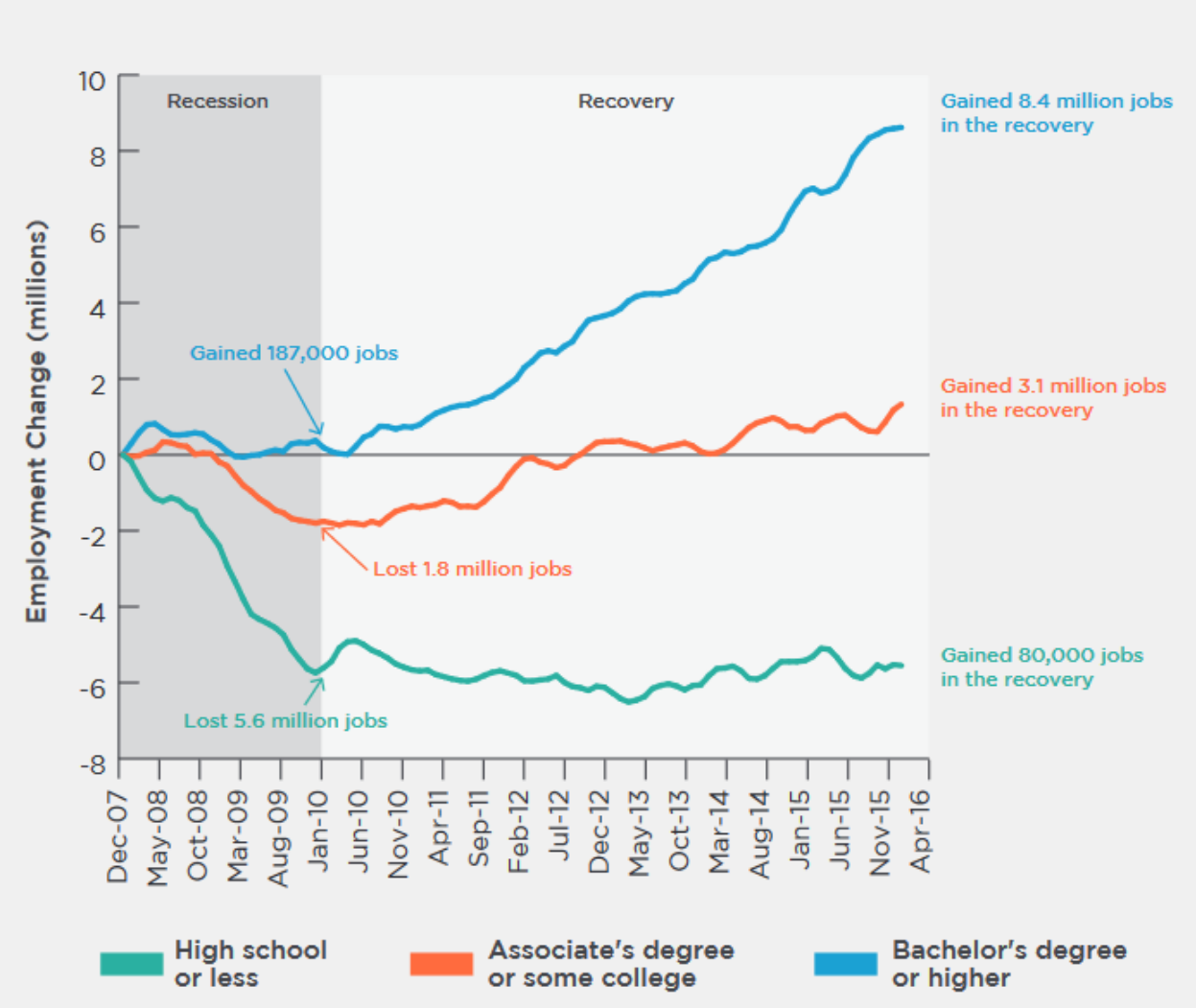
Figure 1. Earnings by Educational Attainment



Source: Tamborini, Christopher R., ChangHwan Kim, and Arthur Sakamoto. 2015. "Education and Lifetime Earnings in the United States." *Demography* 52: 1383–1407.

Equally important, the more highly educated an individual is, the less likely they are to suffer economic reversals when the country falls into a depression—education is a resilience insurance policy. During the Great Recession, baccalaureate degree holders continued to be employed; they did not lose their jobs (Figure 2). The number of employees with associate's degrees who lost their jobs was relatively small and employment rebounded quickly after the bottom of the recession. Those without a postsecondary education suffered major employment losses—and many of the jobs lost were never recovered.

Figure 2. Labor Market Impacts During and After the Great Recession by Educational Attainment



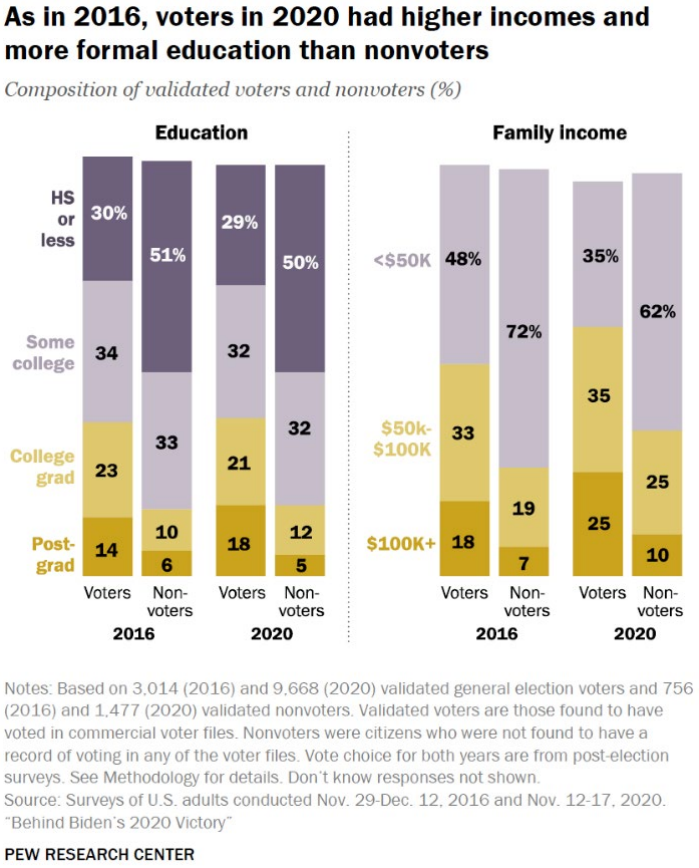
Source: Carnevale, A.P., Jayasundera, T., & Gulish, A. (2016). *America's Divided Recovery: College Haves and Have-Nots.* Washington, D.C.: Georgetown Center on Education and the Workforce. Retrieved September 16, 2022 from https://cew.georgetown.edu/cew-reports/americas-divided-recovery/#resources.

Society also benefits from a robust higher education ecosystem. Residents with more education pay more taxes that are the source of revenues needed to provide services that benefit the residents of the state in myriad ways. Well-educated communities are also less likely to draw on state-supported services; they have better health and require fewer medical services, they are less likely to find their way into the penal system, and they require less support of social service agencies. For example, according to the U.S. Department of Justice, in 1997, about 41 percent of inmates in state and federal prisons and local jails had not completed high school, where only 18 percent of the total adult population had not completed high school.[1] A 2012 study showed that life expectancy varied markedly by education and race, and that the differences between those

[1] Harlow, Caroline Wolf. "Education and Correctional Populations." *Bureau of Justice Statistics Special Report*, January 2003, 12.

with a college education and those without were growing wider over time.[2] In the 2020 presidential election, college graduates were much more likely to vote compared to non-graduates (Figure 3).[3] Taking steps to ensure that residents are highly educated is a cost avoidance strategy for states.

Figure 3. Voting Behavior Associated With Educational Attainment and Income



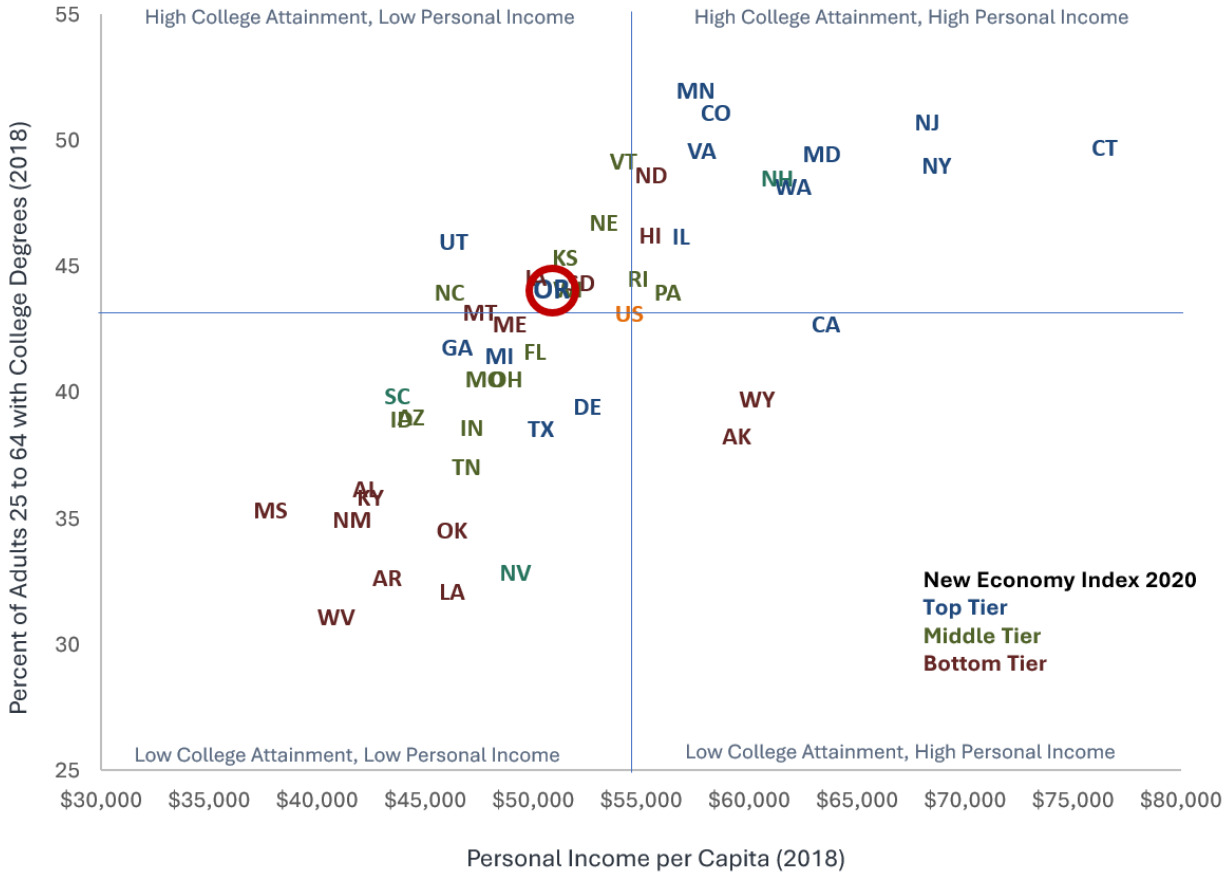
Too often lost is a recognition that there is a strong relationship between education attainment, personal income, and the nature of a state's economy. Evidence shows that those states that rank highest on the New Economy Index—they have an economy based on information and biological technologies—are the states with the highest levels of education attainment among the working age population and, consequently, the highest levels of per capita income. Relative to other states, Oregon has low personal income despite high educational attainment rates and an

[2] Olshansky, S. Jay, Toni Antonucci, Lisa Berkman, Robert H. Binstock, Axel Boersch-Supan, John T. Cacioppo, Bruce A. Carnes, et al. "Differences In Life Expectancy Due To Race And Educational Differences Are Widening, And Many May Not Catch Up." *Health Affairs* 31, no. 8 (August 2012): 1803–13. https://doi.org/10.1377/hlthaff.2011.0746.

[3] "As in 2016, Voters in 2020 Had Higher Incomes and More Formal Education than Nonvoters." *Pew Research Center - U.S. Politics & Policy* (blog), June 30, 2021. https://www.pewresearch.org/politics/2021/06/30/behind-bidens-2020-victory/.

economy rated among the top tier in recent years (Figure 4). Rising into the ranks of states with a high technology-based economy is the objective of numerous states. The states' colleges and universities are the tools to be employed in reaching that goal.

Figure 4. The Relationship Between Educational Attainment, Personal Income, and Economic Conditions



Source: U.S. Census Bureau, American Community Survey; Bureau of Economic Analysis, ITIF

As stated previously, Oregon has proved that it can establish priorities and develop plans to pursue those priorities; it has done so in the areas of transportation and environmental protection. But addressing these and other priorities costs money. Oregon is heavily dependent on income taxes to fund those activities and programs it cares most about. Increasing tax revenues by increasing the tax base rather than tax rates is dependent on having more tax-paying residents in high-wage jobs. The ability of the state to invest in those quality-of-life priorities is dependent on its investment in its colleges and universities. Reducing the investment in higher education may free up resources for other priorities in the short run, but this strategy will fuel a race to the bottom; it will not put the state on the long-term path to prosperity.

The institutions that can play the central role in creating the new Oregon are facing numerous challenges. Among the most important of these are those presented by the interrelated issues of demography and institutional finance. Oregon's colleges and universities (especially the universities) are heavily dependent on tuition revenues to fund general operations. This makes

institutional finance extremely sensitive to enrollment changes. There are strong incentives to enroll as many students as possible, which can layer additional stress on other public institutions which may lose those students to their better-positioned peers The demographic projections show a leveling off of high school graduates; it will become increasing difficult for institutions to grow their revenue streams by enrolling more students from their traditional student populations, at least without engaging in some very different practices. Oregon has among the lowest high school graduation rates of any state in the union. The number of high school graduates can be increased by increasing this low graduation rate: even moving the rate to the national average would increase the pool of potential college enrollees. Since each of the universities has teacher education programs—and ties to the public school system—it is in the institutions' self-interest to assume more responsibility for the success of these schools.

The students who do graduate from high school in Oregon also have a lower rate of college participation than is true in other states; Oregon graduates are more prone to heading to the workplace rather than to college. Enticing more of the recent high school graduates to enroll in college is another strategy by which the pool of potential enrollees can be expanded. But this will require adapting education programs to meet the expectations of this untapped pool of potential students. Since they are opting for work over college, the approach will have to be one that builds on their proclivities to emphasize economic benefits. This means that academic programs designed to attract these students will have to provide them with the skills and knowledge that gives them a step up the economic ladder in a relatively short period of time—a program structure that is the inverse of common practice in which students are expected to take broad, general courses before taking more occupation-related courses. Since these students are also likely to be working while going to college, flexibility in scheduling that allows them to simultaneously pursue both working and academic lives is a prerequisite to their willingness to enroll in college, and to be successful once there. This same set of requirements pertains to attracting individuals who have been in the workforce for several years and are seeking the benefits associated with getting some level of postsecondary education.

These approaches to expanding the pool of potential students are worthy and necessary, but they will not yield immediate results. In the meantime, all institutions have an incentive to compete strongly for a stagnant pool of traditional-age students. In this competition, those institutions with less prestige and fewer programs that can be offered to potential students are at a disadvantage. These disadvantaged institutions must be sustained in order to serve a group of students who are unlikely to be served successfully by those institutions that cater to a more academically prepared group of students. The question is "What's the mechanism by which these institutions can have a sustainable business model in the face of increasing competition for their traditional students?"

This demographically induced constraint on enrollment growth is running headlong into the expenditure realities facing Oregon colleges and universities. By policy choice, Oregon is a labor-friendly state. As a consequence, the level of benefits paid by the state's academic institutions is higher than is the case in most other states. And through agreements reached at the state level, the costs of benefits increase each year. This set of circumstances has two major implications for the postsecondary institutions. First, the revenues that are devoted to compensation buy fewer faculty and staff assets than is the case elsewhere in the country. The only way that colleges can

devote more resources to compensation is to employ fewer personnel. In the end, this limits the capacity of institutions to provide the range of support services necessary to help students succeed to invest in new programs and services to students, employers, and communities. Second, the ability to raise tuition rates sufficiently to cover increasing personnel costs is constrained by public sentiment that says that tuitions are already too high (and in Oregon they are high in comparison to other states), policymakers who act to limit annual rate increases, and the reality that raising tuition could push the price of higher education beyond the means of more and more students and lead them to delay or decline to attend college. Yet the evidence is that, once students take a break from academic pursuits, the chances of getting them back into the pipeline decrease. The longer the break, the less likely that the stop-outs will return.

This combination of factors—constrained ability of institutions to increase tuition revenue, either through enrolling more students or substantially raising rates, and the inexorable increase in the costs of operations—put the institutions in a very difficult position. There are multiple ways in which the institution's funding models can be stabilized in ways that provide them a viable future. No single action will suffice; it will take a combination of steps to accomplish the desired objective. Chief among these steps is additional state funding that is more intentional in the ways in which it is expected to address state priorities. State funding should be directed to:

- Rebalancing the shares borne by the state versus the student. A practical way to accomplish this would be to provide additional funding to the institutions in exchange for an institutional commitment to constrain tuition increases (essentially substituting state funding for student funding). This would not provide additional resources to institutions in the short run, but by stabilizing cost of attendance over time it would make college attendance more affordable and be a tool in convincing more students to attend college—a mechanism to improve the state's low college participation rate. The power of this action could be enhanced by increasing state funding in exchange for a reduction in tuition (buying down the student contribution).
- Investing in the development of new capacity, primarily faculty and equipment necessary to mount new programs and to increase research competitiveness in key areas. Such investments need to be made in the context of clear priorities derived from a statewide economic development plan.
- Making sure that college is affordable for adult, primarily part-time students. The current student financial aid programs work reasonably well for full-time students who are recent high school graduates. But they do not work well for the majority of community college students who are neither full-time nor recent high school graduates. Student assistance based on a state-level work-study program is likely the best device to address this particular affordability issue.
- Rewarding institutions for their role in enhancing the state's labor pool by educating out-of-state students who remain in Oregon after graduation are employed in the state. It is understandable that the state would be reluctant to pay for the education of residents hailing from other states, but recognizing the contributions of state institutions to meeting the workforce needs of employers would be sound public policy.

Arguments for increased state investments in higher education will come across as self-serving unless framed in the context of their contributions to achievement of high priority state goals. At the moment, there is no widely shared vision for the future of Oregon, nor a statewide economic development plan, that provides that context. It behooves higher education leaders to encourage policymakers to take the leadership in creating a body charged with developing such a vision and plan. If efforts to persuade policymakers to take this step are unsuccessful, education leaders will have little choice but to assume this responsibility and, working together, articulate a future oriented plan for Oregon and attempt to sell it to not only policymakers but the general public as well.

Institutions cannot rely solely on the state for the provision of additional resources. Other sources must be tapped as well. While demographics make it harder to enroll additional students, this is still a possible source of additional revenues. Doing so will take action on a variety of fronts:

- Improving retention and graduation rates. Oregon institutions, particularly community colleges have plenty of room to improve in this regard. It's an old saw, but nevertheless a true one, that the individuals who are most reachable in any effort to increase enrollments are students who are already enrolled but need assistance of one kind or another to continue their enrollment.
- Taking steps to encourage enrollment of students who choose work over college when they leave high school. This will require not only recruitment strategies that make the economic case to these students, but changes in academic offerings so that these potential students can find programs that cater to their desire to get into well-paying jobs quickly. It will also require that the prospective students not perceive college enrollment or work as an either/or choice, but rather they should recognize realistic options that permit them to work and study in varying degrees simultaneously. This work will fall primarily to the community colleges; they will need support in developing the capacity to meet these demands.
- Working with the public schools to improve their graduation rates.

Employers represent another potential source of revenues for institutions. Experience in other states indicates that tapping employers for gifts is a hard sell. It is an easier sell when they see an immediate benefit. A state-funded work study program that matches employer contributions to paid internships or other work experiences with state money is one way to get some employer skin in the game. Such a program would help institutions through tuition revenues from students who would otherwise not enroll.

Finally, the colleges and universities themselves have to take some responsibility for ensuring their own financial futures. Their skin in the game will necessarily come from increasing the efficiency with which they provide educational services. They can attempt to cut costs within the constraints of current business models, but too often this results in accelerating a downward spiral rather than leading to fiscal stability. Efforts to cut costs inevitably lead to reductions in programs and staffing of student support services, steps that make the institution less attractive to potential students and less able to ensure that those students who do enroll are successful.

A much more fruitful path to creating efficiencies is through institutional collaborations in both administrative and academic functions. There are numerous examples around the country of institutions coming together to jointly operate a variety of back-office functions—purchasing and contracting, construction management, IT, and human resources, accounting, and the maintenance of student records. Considerable savings from such collaborative efforts have been well documented. Less common, but potentially more beneficial (in part because they offer not just greater efficiency but also the extension of the reach of academic programs to populations that might otherwise struggle to access them), are multi-institutional approaches to the delivery of academic programs. Such collaborative efforts take a variety of forms:

- Taking steps to improve student transfers among institutions. This effort is on-going in Oregon, but the effort needs to be imbued with a much greater sense of urgency.
- Joint offerings in which faculty from two or more institutions work together to deliver an academic program.
- Collaborations in which one institution delivers a program in which it has special expertise to students at other institutions, an arrangement in which the receiving institution(s) provide the administrative and student support services and the sending institution is responsible for delivery of the academic content.

These latter forms of collaboration benefit greatly from the presence of an entity staffed by individuals who have demonstrated strengths in program management. They can be accomplished without this kind of infrastructure, but the results seldom get institutionalized in these arrangements, unraveling when the key actors change jobs or lose interest.

Summary of Findings and Observations

What follows is a high-level discussion of the principle findings that emerged from an extensive data analysis and from multiple tours through Oregon to meet with institutional leaders, students, community members, and other key informants and stakeholders. Details concerning the approach to generating these findings and observations can be found in the appendices.

a. Summary of data analyses. The extensive data analysis undertaken during the course of the project led to a set of key findings that inform the recommendations made later in this report. The data supporting these key findings are also presented in the next major section of this report.
    - The proportion of the adult (25-64-year-olds) population with a postsecondary credential of value is at the average of the nation as a whole. The proportion of younger adults (25–34-year-olds) with a postsecondary degree is well below the national average and the attainment levels of many competitor countries. Those individuals entering the workforce are less well educated than their peers in competitor states and countries.
    - Education attainment rates—and per capita incomes—vary greatly from one county to the next within the state.

- The Oregon economy is more dependent on manufacturing, government, and farming and forest products than the nation as a whole, although the manufacturing sector has shrunk significantly over the past decade. Oregon lags the nation in business and professional services (although this sector has grown substantially in recent years), information, and finance. These latter sectors are indicative of a high-tech economy.
- The types of jobs available in different regions of the state vary markedly.
- Oregon has an aging population. The projected number of individuals in the prime working age cohort is stable at best. The older population is projected to grow significantly. This finding has serious implications for the supply of the necessary workforce, as well as for sustaining the level and kinds of services required by the evolving needs of the state's population.
- Oregon is projected to have a slight decrease in the number of high school graduates over the next 15 years. California, the primary state from which non-resident students are attracted, is projected to have a much larger decrease in the number of high school graduates. Growth in numbers of high school graduates in Washington and Utah will not compensate for anticipated losses in California.
- Oregon has among the lowest rates of high school graduation (ninth graders who graduate within four years) of any state in the union.
- The rate at which those students who do graduate attend a postsecondary institution directly after high school is also among the lowest in the country.
- Enrollments in the state's community colleges have been declining consistently over the past decade with the greatest decreases being among white students. The declines in community college enrollments are among the steepest of any state in the country. University enrollments, collectively, have remained generally flat overall, though the regional universities, PSU, and UO have experienced declines.
- The participation rate of adults (ages 25-49) in Oregon is close to the national average.
- Community colleges enroll a high proportion of part-time students. Universities enroll far fewer. Community colleges also enroll a large number of students in non-credit programs although there are wide variations in non-credit enrollments from college to college. These two facts taken together indicate that many community college enrollees are part-time students who enroll in noncredit (likely workforce oriented[4]) programs.
- Not only are graduation rates low in Oregon institutions,[5] but Oregon produces few graduates in the key fields of technology workers and health care professionals relative to the employment base of such occupations in the state.

[4] Enrollments in community-oriented programming also accounts for a portion of noncredit enrollment, but these activities are not the focus of this report.

[5] Graduation rates here do not include students who successfully transfer from two- to four-year institutions without a degree.

- On a per-capita basis, Oregon universities conduct substantially less research than states that are economic competitors. Oregon is in the top third in expenditures per capita on research in psychology and the life sciences but near the bottom of the list with regard to expenditures in the fields of computer science and engineering.
- Public institutions in Oregon have higher expenditures per FTE in spending categories related to their missions (which excludes auxiliaries and other self-sustaining programs). One explanation for this may be found in the data that show that the ratio of benefits to salaries is higher in Oregon than in all but a handful of other states (partly due to PERS). They also consistently report that they have insufficient resources (especially faculty and staff) to fulfill their missions.
- These spending patterns require more revenue. On average, Oregon's colleges and universities have more revenues per FTE student from the combination of public sources and tuition than the national average. Universities get much more of their revenues from tuitions but substantially less from state appropriations that the national average. Community colleges get more revenue from both tuition and public sources (state plus local tax revenues) than the national average.[6]

b. A synthesis of primary takeaways from stakeholder meetings (in no particular order).
   - For community colleges, most new programs are grant-funded. There is a need for an investment fund to cover the start-up costs for new programs.
   - Current student financial aid programs do not work well for part-time students, particularly students who are seeking career certifications through non-credit programs. Paid internships would be the most helpful form of student aid for many part-time students.
   - Housing costs are a primary barrier for students' ability to pay for college. These costs are also a problem in hiring employees.
   - Lack of childcare is the other major factor serving as a barrier to college enrollment.
   - CTE programs in the high schools are becoming a major competitor for community college programs. Oregon needs much better articulation arrangements.
   - The fact that Oregon institutions operate on a quarter system increases costs and makes articulation with out-of-state institutions more difficult.
   - There is a real disconnect between higher education programs and licensing boards. HECC could provide a real service by working with licensing boards to develop better linkages.
   - A common thread from advocacy groups was the need for minority students to have more teachers and mentors who "look like them."
   - For rural students access to high-speed internet remains a major problem.

[6] The data source for this statement is SHEEO's State Higher Education Finance report. SHEEO backs out all appropriations and FTE associated with non-credit enrollment; Oregon's own reporting includes the non-credit FTE in the denominator.

- The Major Transfer Maps process is not working. It would be better to put more emphasis on developing common course numbering.
- The funding model for community colleges needs to reward
  - Transfers.
  - Completion of certifications as well as certificates and degrees.
  - Completions by at-risk populations.
  - Progress made by students in adult basic education and English as a second language programming.
- Community colleges would benefit greatly from having a good supply of data about:
  - Employer needs in their region
  - Minority-owned businesses and minority employees—where they are working and the occupations in which they're employed.
- There has not been nearly enough attention to credit for prior learning—veterans made particular note of the inability to get academic credit for skills learned in the military.
- The lack of a statewide policy for dual enrollment has contributed to unproductive competition between public providers and serves as a barrier to student mobility and affordability.
- Behavioral health is an issue in all parts of the state—there are not enough programs tailored to needs and not enough providers to meet student and community requirements.
- The state needs access in all regions of the state to GEAR UP programs and the kinds of services they provide (Note: Tennessee is a place to look for a good example).
- Oregon needs a lot more capacity to collaborate on both administrative services and academic programs.
- Inclusion is a worthy objective, but institutions are getting initiative fatigue. Too many initiatives without integration. Many argue for conflict resolution as a place to start.
- Poverty is a root cause of many of the issues, which greatly affects the ability to address the equity agenda.
- Students need "navigators" from their first contact with an institution through program completion.

Criteria for Recommendations

Prior to formulating recommendations, it is helpful to identify some key principles or criteria to serve as guidance. The following reflects the most essential of those criteria.

1. **Students and state needs come first.** Oregon's public higher education institutions are essential instruments to address the needs of students and the state. In doing so, they

are the means to an end, not the ends themselves. Oregon's public policies addressing postsecondary institutions should put the highest priority on identifying and serving those needs, and the state's institutions should reflect that priority in their decision-making and their management. In identifying state priorities, Oregon should explicitly include economic development as a focus and consider the varied contributions that colleges and universities make in that regard, from providing the talent to meet workforce needs to generating new knowledge and applications to drive growth, prosperity, and healthy communities. For the community colleges, they additionally must prioritize local needs.

2. **Regional variation.** Oregon's colleges and universities, and the state policies that support them, must account for regional differences in workforce requirements, student populations, and other conditions. This is especially germane for community colleges whose governance structures and funding sources tend to assure that local requirements are given priority. But Oregon's universities also must attend to regional needs, even when they have a statewide, national, or international mission and reach.
3. **Collective action.** In the absence of a formalized system structure, Oregon needs mechanisms that help to ensure that habits form around achieving collective responses to systemic problems.
4. **Local control of the community colleges.** Community colleges in Oregon are locally controlled and benefit from substantial local funding support, which requires decisions on issues like program approval to be handled quite differently from those that are made with regard to the universities.

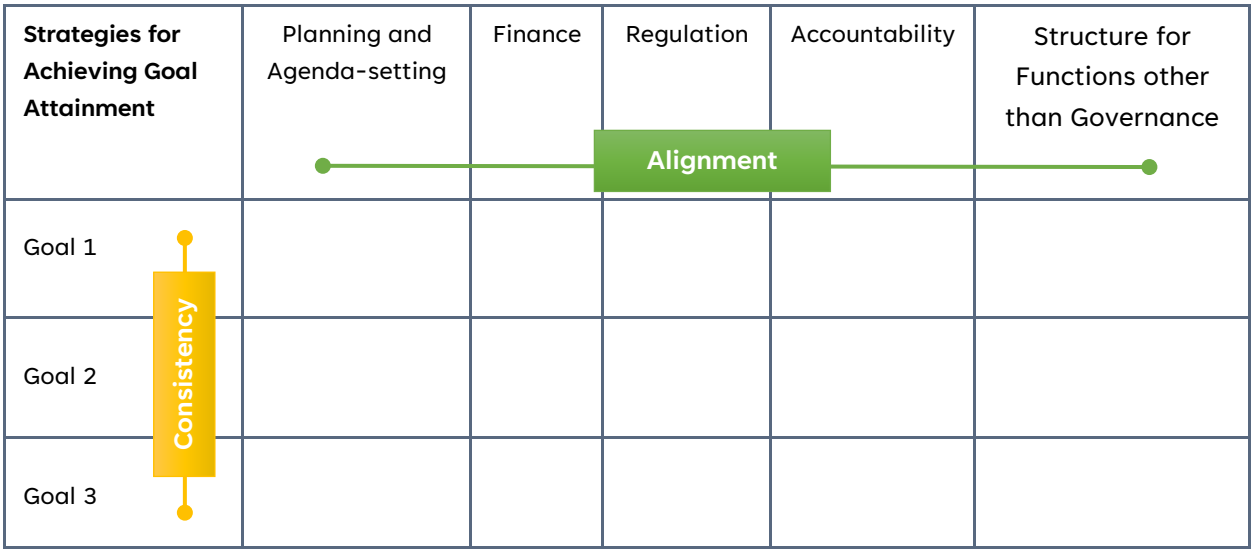
Recommendations

These criteria combined with the findings and observations presented in this report provide the basis for a set of recommendations developed to best meet the needs of Oregon and its residents. Collectively, they seek to more fully recognize and capitalize on the value of the state's public colleges and universities as critical assets in driving economic and social mobility, achieving equity, spurring economic development pushing the frontiers of human understanding, and meeting the needs of employers, students, and regions and communities. A major theme that runs through all these recommendations—in addition to appearing as a separate stand-alone recommendation—is the need for Oregon and its institutions to emphasize policies and practices that reduce gaps in access, participation, and success in higher education, the workforce and the economy, and in society more broadly. Not only should these efforts elevate equitable outcomes, but the deliberative process of reaching decisions about what to do and how to do it should always purposefully incorporate considerations of equity and impact on different populations.

These are a set of recommendations designed for the presidents of Oregon's colleges and universities either to implement themselves or to implement in concert with partners in the state. These recommendations are framed in keeping with a conceptual framework that NCHEMS has found useful. The framework is based on the understanding that continuous improvement can be achieved when there is a clear set of goals that have widespread acceptance and when the

available policy tools are utilized in ways that are aligned with those goals—they are applied in ways that reinforce each other. The tools available are summarized in Figure 5.

Figure 5. Strategies for Achieving Goal Attainment



In summary these tools include:

c. The establishment of clear and widely accepted goals that provide guidance for policy actions for decisionmakers at both state and institutional levels. The goals should reflect regional as well as state priorities. It is important to note that the goals should be first and foremost goals for the state—higher education goals are most effective when developed in the context of state goals.
d. Agenda-setting—the identification of key issues that need to be addressed by state policymakers and the collective higher education leadership of the state.
e. Funding—the allocation of state funds in ways that support the agreed upon goals in the most efficient and effective ways possible. Funding should extend beyond support for current operations but also include strategic investments in new capacity.
f. Regulation—as applied to higher education, rules that provide guidance for institutional functioning, especially in terms of what programs they can offer, academic policies addressing student mobility, etc. Because regulations often impose burdens and insert the state into policy judgments institutions (and their faculty) claim as properly their own, they should be a tool of last resort. But they are a powerful tool that can be employed if necessary.
g. Accountability mechanisms—regularly monitoring progress on the achievement of stated goals and institutional contributions to those achievements.
h. Structures—organizational mechanisms put in place to perform particular functions within the current governance model.

Informed by findings from our quantitative analysis, by input from stakeholders gathered during our visits and regular conversations with the Advisory Panel, and by the framework described above, this report concludes with the following recommendations.

1. **Promote the creation of a process for articulating a vision for the future of Oregon.** Throughout the project, it was noted that decision-making in higher education is hampered by the absence of a clear vision for the future of the state—a vision that would provide guidance and a broader context and direction for what investments the state makes in general and why it invests in higher education institutions in particular. There seems to be a clear sense that it does the latter in an effort to ensure individual opportunity is as widespread as possible—particularly through its rhetoric around making improvements in equity. But the lack of vision was particularly evident regarding any form of planning for economic development in the state. Most notably absent was in how state policymakers and other influential leaders expect higher education to contribute to spurring economic development by reinforcing Oregon's existing employers and industries or by incubating and nourishing new ones. Oregon's task force on semiconductors was one prominent exception, but even that industry-specific initiative has not been woven into a more comprehensive plan for leveraging higher education to support economic development activities through intentional policies including funding.

   In contrast, states that have managed to develop and maintain a level of momentum regarding the evolution of the higher education enterprise in the state have developed such a future-oriented focus. The development of such a vision is best led by the governor (e.g., Tennessee and Kentucky), but it has been led by well-respected legislative leaders in some states (e.g., North Dakota). In the absence of impetus from either of these government branches, institutional leaders, working together and in collaboration with HECC, should mount an effort to gain legislative approval for a Blue Ribbon Commission charged with creating such a vision with the general composition specified and the method of naming members indicated. More important than the formal positions of members is their stature in the state. Developing the statewide vision is a task beyond the purview of the HECC, notwithstanding its assignment to conduct statewide planning, because the vision cannot be created from within higher education, and it cannot be perceived as being a vision *for* higher education. Rather, this task requires leadership, engagement, and buy-in from major industry, political, and opinion leaders within the state, and its references to higher education need to be about how it will be useful in supporting that vision. This imperative calls for the composition of the group's members to have fewer, rather than more, direct links to existing higher education institutions. Although the group should prioritize input from the state's colleges and universities, its members should come from the legislature, the ranks of influential state CEOs, major statewide media, important foundations with a keen interest in Oregon, etc. Attention to obtaining the voice and perspective of critical informants generally and marginalized communities in particular should be a priority of the Commission's approach to generating its findings and recommendations. While HECC cannot control the creation or functioning

of such a Commission, it should serve as the primary staff to the Commission and actively coordinate the collection of that input.

2. **HECC should continue the development of the statewide strategic roadmap for postsecondary education to be more inclusive and to particularly address statewide and regional economic development needs.** Oregon's current strategic roadmap is ripe for a more comprehensive focus on the ways higher education is linked to economic growth. The state's current focus on educational attainment remains the most ambitious of any state; for many years the goals it articulated spurred substantial change in postsecondary education and helped drive improved outcomes and attainment for state residents. But even with a renewed push to close attainment gaps based on race/ethnicity, the public agenda reflected by Oregon's educational attainment goal appears to have lost considerable traction. Oregon has an opportunity to rekindle momentum and steer state efforts and investments with renewed coherence by expanding on its strategic roadmap and adopting strategic priorities that addresses the broader range of the state's current needs and its vision for the future, as articulated in the prior recommendation. HECC should undertake an effort to renew its strategic planning activities with these broader goals at the forefront, ideally with the full backing of a report from the commission called for in the previous recommendation.

   Such a plan would go beyond measures of educational attainment to double down on making progress on achieving equity and on meeting workforce needs. These are more closely related than is commonly acknowledged—the equity component of a new plan should not neglect access to high-paying occupations and the programs that lead to them. Moreover, as a result of demographic change and the need for social justice for growing populations that has never been greater, the revisions must adopt a strong statement and aggressive goals for resolving long-standing equity concerns. The plan should also recognize the ways in which the nature of equity gaps differs from one region of the state to another. Such a plan should be developed in close collaboration between HECC and the institutions and it should much more closely tie the priorities for higher education to the future of the state.

   To do that, it should include a higher education response to a thoughtful economic development strategy at the state level, a strategy that is currently absent. This is not to say that there are no such plans floating around the state, but rather that there is no plan at the state level that comprehensively addresses the increasingly tight linkage between education beyond high school and societal prosperity. This plan must acknowledge the variation across regions of the states, and it should place a major emphasis on aligning the educational programming available with both existing and aspirational workforce development needs of each region and the state as a whole. But the plan should go beyond responding to workforce development needs and include a focus on workplace development as well. As a result, it also should specify how state investments in research and technology transfer matter, how the state can draw upon its postsecondary education investments to attract and retain employers, and how venture funding supporting applied

research can drive homegrown enterprise. A major element of this component of planning should include outreach to employers, whose voice in policymaking in the state is diffuse. A coherent message from employers of all sizes has helped drive productive reforms in other states. Working together and with leaders of businesses and representative organizations, HECC and institutions should work to cultivate that coherent voice to advocate for how the state can and should benefit from investing (more) in higher education. HECC and the institutions should work together to develop a strategy for creating a strong partnership with the state's employers.

3. **Reinforce the urgency and criticality of achieving equity.** Judging from the public expression of the need to close participation and attainment gaps among different populations, equity is a clear priority for postsecondary education in Oregon. It would be a clearer, more operational priority—with a better likelihood of changing behavior—if targets were explicitly stated, progress against them was measured, and these data were used to impact policy and practice. Equity is a cross-cutting issue that can and should be addressed using all of the policy tools previously described. The role of HECC in this arena is to continue to maintain equity as a state priority, to make equity a factor in performance funding, and to emphasize progress in achieving equity goals as an element of the annual accountability report. The Coordinating Commission can also serve as the convener of conversations focused on sharing good practices.

4. **Oregon's public postsecondary education sector should adopt coordinated, collective, systemic behaviors, which can be achieved without resorting to governance changes.** This is possible by creatively aligning strategies and incentives as described in Figure 5.
   a. **Role and mission.** In 2019, NCHEMS and SmithGroup developed a capital strategic plan for HECC's use in addressing the capital needs of the public universities (the community colleges' capital needs were not in the scope of the project). One of the recommendations put forward in that report was to urge Oregon to better define and differentiate institutional roles and missions, partly as a critical element to determining the need for space in various types and configurations but also as a device for providing guidelines for the types of institutional change that can be pursued without extensive approval processes. While the pandemic surely upset any effort to address this recommendation, it is no less urgent now than it was three years ago, and the utility of bringing greater clarity to institutional roles extends beyond capital planning to touch on policy priorities and strategy at every level and across the framework illustrated in Figure 5.

      This kind of designation of role and mission may exist within the authority of HECC, at least in terms of "approving mission statements." What is needed, however, is a clear set of differentiated "operational missions," which serve a different purpose. Whereas mission statements are often deliberately brief, as well as lofty and inspirational, operational missions describe the program array and expectations for research and public service activities, audiences to be served (students' geographic origin and prior academic experience, in particular), and other special elements of mission, such as

Land-grant status. This may include a clear expression of the academic preparation levels students should be expected to have in order to be admitted to different institutions. Alternatively, the state could adopt a set of statewide admissions requirements as a separate policy. Having clear standards would help to reduce unproductive competition among public institutions in the state while improving communication with the K-12 sector about what is necessary for success in college.

Arkansas has defined operational missions in this way for its public institutions.[7] Using this approach does not eliminate the tensions among public institutions, but it has sharply reduced them while equipping policymakers with clear guidelines about institutional missions that help in preserving intentional decision-making on broad public policy matters. Getting to the point where institutions in Arkansas reached a general agreement about their respective operational missions required the state to mandate the development and use of such designations. Creating the designations required the engagement of an external entity to assist the state's coordinating board in a data-based and deeply consultative approach.

The stickiest issue in this arrangement is almost always centered on articulating the "audiences to be served" component of the mission statement. This is particularly the case where some institutions are explicitly charged with serving the needs of students in a specific region of the state while other institutions have a state-wide charter and, therefore, feel it is within their mission to offer programs in all parts of the state. These are issues to be worked through by the institutions in collaboration with HECC. One approach is to adopt a strategy like that employed in Oklahoma where regional institutions are assigned "responsibility areas"—geographic areas in which they are assigned responsibility for assessing needs and finding ways to address those needs. In many cases, this involves inviting other institutions (most frequently those institutions with a statewide portfolio) to deliver programs in their back yard, with a proviso that revenues would be shared, to reflect the role of the regional institution in facilitating delivery of programs in their area.

The benefits of making clear distinctions are in sharpening the discourse between institutions and policymakers, a discourse that is often muddled in its absence. With differentiated roles, institutions have a clearer case to make to policymakers about strengthening the priorities that are within their portfolio, such as graduate education. Policymakers can better direct investments in capacity development, while also being better equipped to be productive problem solvers when institutional interests come into conflict. Provosts and HECC can more appropriately resolve questions about the

[7] Arkansas Code §6-61-207 authorized the Arkansas Higher Education Coordinating Board to establish role and scope designations for the state's public institutions. It does so under its "Role and Scope Designations" policy located at https://adhe.edu/File/18_-_ARKANSAS_INSTITUTIONS_OF_HIGHER_EDUCATION_ROLE_AND_SCOPE_DESIGNATIONS.pdf.

programmatic needs and how best to serve them to meet regional and statewide goals, as well as to weigh the benefits of collaborative opportunities.

It should be noted that establishing these roles should be intentionally linked to the achievement of the broad strategic vision for the state, and for how higher education resources should be deployed to achieve that vision, which Oregon needs and currently lacks. Further worth noting is that these considerations are important for the universities as well as the community colleges, but the specific and minimally overlapping geographic spaces they serve is often sufficient for differentiating them. Nevertheless, it is important not to neglect the particular competencies in specific areas of subject matter that community colleges may claim, nor the localized workforce requirements that they face (often tightly coupled). In addition, these role and mission considerations in the two-year sector should also consider how to best deliver certain, typically high-cost programs to areas that have sporadic need for them such that maintaining the program to train students for corresponding occupations, e.g., radiologic technicians, is inefficient or untenable.

This landscape review has created much of the data needed for developing operational missions, but it has been outside the scope of this project to specify them for each institution.

b. **A major HECC role should be facilitating solutions to problems that exist at the boundaries between institutions and sectors.** This is not intended to suggest that HECC's efforts in other areas should be curtailed. Rather, it is a recognition that HECC is uniquely positioned to address the gaps between institutions and between institutions and other parts of state government. Among the priority issues at these intersections identified during the stakeholder engagement activities were:
    - Articulation and transfer between community colleges and universities. This is already ongoing but needs clearer expectations and timelines. Considerable effort is going into the development of Major Transfer Maps (MTMs). By all reports, progress is painfully slow and the benefits to students of the work to date is uncertain. There is a consensus among institutional academic leaders that a more productive path would be to transfer the effort being invested in the development of MTMs to speeding the development of common course numbering, starting with the courses that transfer with the greatest frequency. Program transfer maps can subsequently be specified in terms of commonly numbered courses. The major focus with regard to creation of MTMs should be development of a common general education curriculum specified by reference to commonly numbered courses. The objective should be agreement on a curriculum that satisfies the general education requirements at all public institutions.
    - Alignment of CTE programs between high schools and community colleges. This work becomes more important as the amount of CTE education increases in the high schools.

- Alignment of academic programs with workforce needs in different regions of the state. Particularly important is working with the state's workforce boards to ensure that new programs offered by community colleges are added to the Eligible Training Provider List in a timely manner. It should be the expectation that community colleges are the preferred provider for training programs conducted under the auspices of local workforce boards. This will require executive level direction from the offices of the governor and the director of workforce development. It will also take considerable accommodation on the part of colleges in order to align their program offerings and schedules to the needs of individuals enrolled in WIOA supported programs. This alignment of programs and workforce needs will require data about regional workforce needs more nuanced than typically available. HECC can provide a real service, especially to community colleges, by developing the necessary data and making them available in a timely fashion. Implementation of actions necessary to meet this particular expectation will necessarily be incremental.
- Working with relevant state agencies to ensure that the processes that link programs and licensure requirements are as seamless as possible for students and institutions.
- Articulating the role institutions play in stimulating and supporting economic development and helping to coordinate the application of university expertise to statewide problems.

c. **Oregon should incentivize collaborative activity among institutions and between institutions and other state and local partners.** While there are a number of collaborations among institutions—or faculty within institutions—across Oregon's public postsecondary ecosystem, the state is missing a systematic way of stimulating and supporting such activity. Effective multi-institutional collaboration is rarely straightforward or easy given the many likely barriers—in incompatible culture, processes and procedures (both among those that exist and others that would need to be created to support collaboration), organizational structure, the preferences of key personnel, etc.—that can derail collaboration before it can become habitual. The financial incentives of collaborating are frequently not obvious to individual institutions, even when potentially greater savings or better services to the state or students may be apparent. Indeed, the need for better cooperation in back-office administrative activities and in the delivery of academic programs to all parts of the state has been one justification for those who have argued for the return of a system in Oregon, but structural solutions focused on functions, rather than another governance overhaul, can deliver systemic solutions without the need to reconstitute a system.

   Institutions, collaboratively, should develop one or more entities expressly designed to provide shared services and to coordinate and manage the joint delivery of courses and programs on their behalf. Such an entity could also be useful in assisting with developing and operating joint activities in applied research, translating research into

marketable products or public services, and collaborative efforts to recruit and retain industries.

As part of the dissolution of the Oregon University System, the State of Oregon required the institutions to participate in such an entity, which is known as the University Shared Services Enterprise (USSE). USSE was needed to ensure that all seven newly independent institutions were able to manage key functions that had been performed by the system office, such as treasury and financial services. Because Oregon has some familiarity with a quasi-independent entity tasked with coordinating shared services on behalf of multiple institutions, it may be an option to separate USSE from Oregon State and create it as an independent, non-profit entity that could serve as the home from which shared services could continue to be offered to the separate institutions, and which could be the recipient of funding directly from the state. It may furthermore be modified to provide similar services to the community colleges as well.

Irrespective of whether the entity is a redesigned version of USSE or an entirely new organization, clear and appropriately designed governance is a critical necessity. Experiences in states like Vermont suggest that these activities are best organized to directly report to the institutional presidents, rather than through a single institution's structures or through a statewide agency that otherwise serves to provide oversight to public higher education (such as HECC). Alternatively, institutions could create a wholly new organization to serve this purpose. The set of activities that the entity should perform may be quite different than what USSE has historically performed.

To leverage interest in collaborative activities among institutions, the General Assembly should appropriate funds to the newly constituted entity. Such funding should primarily be aimed at seeding collaborative activities for a sufficient time for the value to be assessed and demonstrated. These funds will enable the entity to take calculated risks that show promise for improving efficiency or the quality and distribution of administrative services or academic programs. Additionally, its efforts should be externally evaluated from time to time, with those evaluations organized, but not conducted, by HECC. The specified entity should also look beyond the boundaries of public higher education to find opportunities for generating efficiencies through collaboration. Possibilities include working with nonprofit hospitals, local school districts and ESDs, and other similarly situated organizations to purchase utilities, acquire physical and mental health services, share transportation services, etc.

The state should also provide seed money for the creation of a similar entity to serve the needs of the community colleges for the purpose of expanding its reach to include service to community colleges or provide funding to the same entity described above (but only if the colleges believe this is a better option than having a parallel entity). This could start as a pilot program to develop a shared ERP system across 2-4

member institutions, akin to the CHESS model in New Mexico.[8] Funds should come from the legislature, the institutions (in-kind contributions should be recognized as funding along with direct support), and private philanthropy. HECC should assist this effort particularly by supporting this initiative within the legislature. It should be a ground rule that participation in such consortia is strictly voluntary, but state funding should be sufficient to create incentives for participation.

The above recommendations speak to the obligations of the state to promote collaboration among the state's public institutions. The institutions have obligations as well. They should accept the reality that resources are limited and that the primary path to acquisition of resources needed to strengthen programs within their missions is to more actively engage with other institutions for provision of programs and services that are outside their core areas of expertise. Shared services rather than mission or program expansion should become a natural response to identified student or regional needs.

In sum, the kind of structural reform being recommended has the following characteristics: it should

- Be based on voluntary participation. There should be no requirement that that all institutions (or all institutions in a sector) participate.
- Extend to academic program delivery as well as collaboration in the performance of administrative functions. Generally, it has been the case elsewhere that the case for shared administrative services is comparably easy to make and to develop solutions. But the need to collaborate in delivering academic programs has potentially greater benefits in savings and especially in ensuring that students and employers throughout the state have access to the programs they require for workforce development or for the achievement of personal goals.
- Be partially supported with state funds, both to seed such activity and to ensure its sustainability. State support is important
    - To send the message that collaboration is a state priority.
    - To create incentives for institutions to participate in collaborative efforts. It is likely that the greatest benefit for many of these activities is likely to be the TRUs and the smaller community colleges, and the level of investment will need to be sufficient to support the activity even without the largest institutions who may elect to maintain their own capacity. Or the investment should incorporate funding specifically to encourage participation by the larger institutions as well, so that the others may also benefit from the more advanced specialization in key areas that the large institutions are able to support.
- Recognize that more than one structure can be put in place to support collaboration on any particular function. For example, the state may elect to stand

[8] See https://www.chess.edu/.

up one structure to manage shared administrative services and a separate one to coordinate shared academic delivery.

The point is that structural solutions can be powerful tools to address issues facing higher education in Oregon, particularly those related to scale. Aversion to formal governance structures should not stand in the way of thoughtful structural solutions to problems in particular functional areas. But success in utilizing these alternative approaches will require that methods of allocating resources create incentives for the institutions to participate—they have to see participation as being in their self-interest.

d. **HECC should revise its approach to program review and approval.** More specifically, it should:
    a. Speed the process for adding new community college programs to the list of approved programs and to the Eligible Training Provider List, with one exception. Approval of bachelor's degrees at community colleges should be vetted through the same program review process to which the universities are subject.
    b. Review any new program proposals for conformity to the approved operational mission that is called for in the prior recommendation. If the program falls within the institution's mission, it would generally be automatically approved (although there may be exceptions). If not, it should be treated as an expansion/change of mission and is reviewed as such.
    c. Be proactive in identifying programs that are needed in a particular region and work with the appropriate institution to put the program in place or work out a shared services arrangement whereby the program can be offered without creation of a new program.

5. **Steps should be taken to purposely align state funding of both institutions and students with the goals expressed in the state's revised strategic plan.**
    a. New state investments in public postsecondary education in Oregon are needed; in addition to being aligned with state goals and complement other funding streams, any such investment should appropriately account for differences in institutional mission, incentivize collaborative activity, yield improvements in equitable access and success, and reduce the funding burden now being borne by resident students. Probably the best example of targeted investment on a large scale can be found in Kentucky where HB1, passed in 1997, provided for major infusions of state resources to enhance the capacities of the University of Kentucky as a research university, the University of Louisville to serve as a preeminent metropolitan university, the comprehensive four-year universities to better play their regional service missions and the new community college system to provide comprehensive services in all parts of the state. On a less grandiose, but still substantial, scale are the investments being made in Virginia institutions to increase the production of computer science graduates and the investments made in Florida to accelerate the growth of the capacity and impact of their research universities. Key to the investments in Kentucky and Florida is the

targeting of funding to institutions on the basis of clear differentiation in the roles that institutions should each play in reaching for a statewide vision and strategy for economic development and civic improvement.

b. Funding models for all institutions should reflect the characteristics of the students served as well as the nature (and different costs) of the academic programs offered. The allocation models should serve to recognize the roles of different types of institutions in the educational ecosystem and avoid creating incentives that have the unintended consequence of homogenizing institutions rather than reinforcing their uniqueness. The research universities likely offer a more expensive array of programs, but the regional universities and community colleges serve students who need a more expensive array of support services tailored to the populations of low-income, underrepresented, rural, adult, first-generation students they disportionately serve, if those students are to be successful.

c. Decisions made during the development of the funding model for universities regarding exclusion of all out-of-state students from consideration should be revisited. Most specifically, degrees earned by out-of-state students should be included in the calculations of the outcome measure *when those students are employed in Oregon after graduation*. Such an approach explicitly recognizes the contributions these institutions are making to economic and workforce development.

d. A calculation should be made at least biennially to determine the adequacy of funding for each public institution including funding from state, local, and tuition sources. Such calculations should appropriately account for differences in institutional mission and the characteristics of students being served. The funding model utilized by HECC should assure that adequate support is maintained for those institutions for which this calculation yields a finding of inadequate funding.

e. The planned review of the community college funding model should use a rational framework that addresses the frugal needs of maintaining each institution's value as an asset to the region and the state, variation in the costs of instruction based on scale (size) and scope (program array), performance incentives sufficient to drive sustainable and continuous improvement, and new investments tailored to community and regional needs. Such a framework might follow the one being adapted in Virginia, and it could be equally useful in revising the funding model for Oregon's four-year institutions as well, when it comes up for its next periodic review and revision process.[9] Its value rests in rationally articulating the costs public institutions face in maintaining the basic functions necessary for any organization to exist (e.g., organizational leaders, human resources, procurement, etc.), preserving the institution's value as an asset of the state or local government, providing an array of academic programs with varied costs of delivery to a mix of students whose characteristics of income, academic preparation, race/ethnicity, age, and other attributes require different student supports with varied costs, and conducting other activities in the public

[9] A more complete discussion of the framework and its elements can be found on pages 45-51 of the final report for Virginia's Cost and Funding Study, which is posted at www.schev.edu/coststudy.

interest such as research and public service. The framework also connects these necessary elements with the state agenda through the integration of performance funding streams, one-time or multi-year (but not recurring indefinitely) funding to support the development and expansion of needed capacity (e.g., new programs to meet state or regional workforce needs, new initiatives to redesign student supports—one application using a recent example would be to have supported the matching requirement for the "Moonshot for Equity" partnership with EOU, BMCC, and TVCC), funding to incentivize collaboration across institutions, and funding for the recurring purchase of goods and services that individual public institutions (or consortia of them) are uniquely positioned to supply. Unpacking institutional budgets and state funding priorities in this manner paves the way to a set of specifications concerning which entities bear responsibility for covering what costs. For instance, the state (or the community college district, in the case of the community colleges) should bear full responsibility for the "frugal" base funding requirement; no tuition revenue should be required to support the preservation and the maintenance of a public asset, in a manner similar to a state park—the land it occupies is public and its maintenance and certain services are necessary even when the park sees no fee-paying visitors. Other elements of the framework have costs that can be shared between funding sources including students. At its most basic, the framework is depicted by Figure 6; a more complete version that is being adapted by Virginia is shown by Figure 7.[10]

[10] NCHEMS made additional modest changes to this diagram from what appears in the recently completed report to reflect the role of local funding, which is not significant in Virginia.

Figure 6. Taxonomy of Institutional Costs

Category	Function and Roles	Funding Responsibility
Other	Advancement, auxilaries, athletics, etc.	Self-support
Research and Public Service	Grants management, community engagement, museums, arts, extension services	Self-support
Innovation/Performance Enhancement & Equity	Investments in continuoous improvement in all areas	Mix
Scale	Course sections, academic support, student services (tutoring, student health, organizaitons and activities, etc.)	Mix
Scope	Breadth of academic programming offered, variation in costs of delivering different programs.	Mix
Maintenance/Renewal	Strategy and planning, deferred maintenance, program/curriculum renewal and relevancy, personal and professinal development	State
Foundational	Senior leadership, governance, compliance, debt obligations, foundational systems (LMS, public safety infrastructure, etc.)	State

Figure 7. Institutional Adequacy Funding Framework

		Category	Function and Roles	Funding Responsibility
		Other	Advancement, auxilaries, athletics, etc.	Institution
		Externally Funded Research and Public Service	Grants management, community engagement, museums, arts, extension services	External Funders
Funding Model	Incentive Funding Tied to State Goals & to Six-Year Plans	Purchase of Goods and Services	Funding for specific purposes, e.g., research on tobacco usage in Southwest Virginia, incentives to seed and support shared academic program delivery, noncredit offerings	Mix (State/Local & External Funders)
		Capacity Building	Funding needed to start new programs or fund initiatives prioritized by the General Assembly, the Governor's office, or through the 6-year plan process	Mix (State/Local, External Funders, & Tuition)
		Performance / Incentives	Factors in the model that recognize: activities related to strategic plan, closing equity gaps, economic development	Mix (State & Tuition)
	Cost Model: Variable Costs	Audience	Semester credit hours (SCH) weighted by student characteristic(s) or added weights applied to headcount	Mix (State/Local & Tuition)
		Scale & Scope	Semester credit hours (SCH) weighted by level and discipline	Mix (State/Local & Tuition)
	Cost Model: Fixed Costs	Preventative maintenance as applied to facilities, technology, and personnel	Shares of facilities replacement value of facilities, technology value, payroll (for professional development)	State/Local
		"Frugal" foundational funding	Benchmarked against similar institutions with relatively low spending on administrative expenses	State/Local

This framework complements this report's call for a clearer articulation of differentiated institutional roles and missions in multiple ways. First, in recognizing the varied costs of programs by scope (discipline and level), scale (enrollment), and audience (student characteristics), it guides the investment of state resources in ways that these elements combine to reflect an institution's mission. Second, by recognizing and integrating the need for new or expanded capacity, the framework encourages state appropriators to make rational investments in view of the specific role each institution plays. Fourth, the framework creates space for specific ongoing funding support to institutions that are providing a specific service, such as meeting the needs of rural populations, conducting applied research on problems that are regional issues, and the like. Fifth, once the framework and corresponding formula generate recommended funding levels by institution, Virginia will specify a targeted cost-sharing goal for each institution that will reflect the extent to which institutions in the Commonwealth are very different in terms of their ability to recruit nonresident students who pay a rate set in excess of the average cost to educate a student, as well as resident students with adequate financial means to cover their own costs of attendance. Finally, together with a clear set of differentiated missions, the framework creates space for the state to consider alternate ways of funding its priorities without abandoning its commitment to boosting student outcomes and eliminating completion gaps—for instance, Oregon could invest resources, as some other states do, in recruiting and retaining exceptional research faculty at designated institutions who can help power economic development, rather than supposing that additional state investments in the institutions that can make the best use of those faculty member should be funded according to the same set of formula calculations that reward low-income students' enrollment and success.

Much of this framework should look familiar to Oregon already, in that Oregon's current funding approach in the PUSF formula recognizes a "frugal" cost of operating that provides a uniform base of support for institutions by sector, with adjustments to that base made according to some fundamental differences in mission (e.g., a limited amount of additional funding is funneled to institutions according to their research activity), followed by activity-based allocation that accounts for variation in institutional costs according to discipline, level, and enrollment, and lastly by substantial funding to institutions on the basis of performance. In addition to a fuller articulation of the various ways in which the state can fund institutions to address its needs, the framework being explored by Virginia differs by building the recommended state appropriations levels from data on actual costs, as opposed to using the formula to proportionally allocate dollars to institutions. In actual practice, Virginia's legislature will have to make difficult decisions when state resources fall short of the framework's demonstrated funding need, but the framework gives its members—and the higher education policy community—a rational lens through which to set priorities for how to make the numbers fit, one which also conveys information about the degree to which funding levels are not adequate to support the actual costs.

f. The outcomes-based feature of the state's resource allocation model should reward production of all degrees and certificates of value—including certificates produced by continuing education (noncredit) programs.
   - HECC should have the responsibility of identifying which certificates are considered to be "of value." Value in this context cannot be limited to earnings but should also reflect positions that are essential to a well-functioning society even if they are not especially remunerative.
   - Extra weight should be given for degrees/certifications that are awarded in high priority workforce fields.
   - Extra weight should also be given for degrees/certificate that are awarded to individuals identified as being in priority population groups.
   - Collaboration should be included as one of the "outcomes" rewarded, such that institutions that deliver a portion of a student's earned credits will receive some of the funding associated with that award.

g. Affordability for Oregon resident students should be addressed as a topic of priority interest. Tuitions are high in Oregon (and state support is relatively low) and college participation is low. While there is no clear, proven cause and effect relationship—although research suggests that higher out-of-pocket expenses disincentivizes student enrollment and success, the correlation suggests a need to make improved affordability a tool in increasing college participation and retention. Fortunately, HECC's recent approval of a budget request seeking substantial increases in the Oregon Opportunity Grant and an expansion of Oregon Promise funds to four-year institutions indicates a willingness to do just that. Even so, a competition among institutions over a shrinking pool of college-age students intensifies, the financing of public colleges and universities will likely grow more complicated, challenging policymakers' capacity to weigh investment options with a clear picture of the likely impacts of their decisions. Oregon needs legislators and legislative staff to have access to sufficiently detailed information about how the evolution of institutional budgets is affecting affordability as a prerequisite for good policy and wise investments. More specifically, it is recommended that:
   - HECC's calculation of the share of students "unable to meet expenses with expected resources," which is provided for each institution as part of an institutional snapshot, should be packaged into a focused annual report on affordability and the elements of funding that contribute to the results of the institution-specific calculations, such that policymakers are better equipped to understand the likely impact of investment decisions.
   - This calculation should be disaggregated by income group, and also created separately for recent high school graduates attending full-time, adults attending part-time, and for students with dependents of their own.
   - A strategy be developed for systematically improving affordability for those students who are shown most disadvantaged in this calculation.

h. Oregon should also consider supplementing the OOG with additional funding to support the Student Contribution portion of the Shared Responsibility Model Calculation. The design of such a program should ensure that student employment opportunities are meaningfully related to their academic pursuits and it should effectively incentivize employers to contribute a portion of the overall funding that would be required. A potential model is Washington state's State Work Study Grant. Another potentially worthwhile example exists with Arizona's Earn to Learn program, which encourages advanced planning and savings by low- and moderate-income students through generous matching funds alongside student supports such as financial literacy education and coaching.

i. Oregon should consider imposing a requirement that high school seniors must complete a FAFSA as a condition of graduating. Such a mandate has proven to be useful in making students more aware of the opportunities for postsecondary education and training and how they are increasingly linked to economic mobility, as well as more knowledgeable about the costs of college. Six states have so far enacted a FAFSA requirement as a condition for high school graduation, and others are considering a similar mandate.[11] The policies that are most effective make ample provisions for exceptions and alternative pathways, such as enlisting in the military, and also ensure wraparound services to assist in the completion of the form itself. Some have even embedded the requirement in college and career preparation courses. But the early returns suggest that states with a FAFSA requirement have seen a boost in college-going rates among targeted populations.[12]

j. One way to slow the pace of rising costs of higher education would be to recognize that Oregon institutional costs are partially driven by the rapid increase in employee benefits and their comparably large share of total compensation, and to address this imbalance by separating the employees of public institutions from the state benefits plans.

6. **Accountability.** Accountability is an underutilized tool that can build support for higher education if employed strategically. It is suggested that:
   a. A single statewide accountability report be produced annually, a report that indicates progress toward achievement of state goals and the contributions of each institution to those goals on key metrics. HECC already produces evaluation reports (which are called for in statute) for each of the four-year institutions on a biannual basis, as well as statewide and institution-specific snapshots that present key indicators. These reports are valuable insofar as they are appropriately aligned with the state's

[11] ECS (2021). https://ednote.ecs.org/an-inside-look-at-fafsa-completion-as-a-graduation-requirement/.
[12] Granville, P. (2020). *Should States Make the FAFSA Mandatory?* Retrieved April 5, 2021 from https://tcf.org/content/report/states-make-fafsa-mandatory/?agreed=1&agreed=1; DeBaun, B. (2019). *Survey Data Strengthen Association Between FAFSA Completion and Enrollment.* Retrieved from https://www.ncan.org/news/news.asp?id=456025; Novak, H. & McKinney, L. (2011). "The Consequences of Leaving Money on the Table: Examining Persistence Among Students Who Do Not File a FAFSA," *Journal of Student Financial Aid* 41(3). Retrieved from https://ir.library.louisville.edu/jsfa/vol41/iss3/1/

strategic priorities, including metrics that are comparable across institutions as well as those that are uniquely capable of addressing institutional performance in achieving state goals relative to their separate missions, assess the way investments by the state are paying off in the achievement of state goals (e.g., is the funding model working properly and are state financial aid programs contributing effectively?), and are widely shared and utilized by the legislature.

b. Affordability be included as a core element of this report, with content as described in the preceding recommendation.
c. The report be made the centerpiece of an annual meeting of key educational leaders, legislators, business leaders, and executive branch representatives. The purpose of the meeting should be to go beyond the report to the identification of strategies for improving the state's performance on key indicators. These strategies can be utilized to create a legislative agenda for higher education for the following legislative session.
d. Access to data by institutions be improved. Institutions report being eager for information, but sometimes find it challenging to obtain good data. In part this is due to variation in institutional capacity to make sense of their own data—the community colleges described recent HECC analyses as particularly intriguing. It also reflects a desire to get information about how their graduates fare in Oregon's workforce, as well as those students who leave without a credential. HECC has extensive data holdings, including engagement with other state agencies with valuable supplemental data, and talented staff that produce careful analyses principally for the public and policymakers. Additional emphasis by HECC on working to answer some of the most pressing institutional questions can support institutional decision-making, especially among those with less capacity for institutional research and effectiveness, and contribute to an improved climate of collaboration with the institutions. HECC can also increase its emphasis on brokering access to proprietary data for institutions—those data owned by other state agencies and those data owned and marketed by companies that do data aggregation—whether HECC does the analysis or facilitates the provision of data. For example, some of the public four-year institutions were eager to gain access to LightCast data, for which HECC has helped broker an agreement on behalf of the community colleges.

7. **Conduct a policy audit.** The recommendations presented above describe the steps the state, the institutions, and HECC should take in order to improve higher education's capacity to serve the needs of the state, its residents and its employers. However, in the course of the project, it became clear that there are some things that they should quit doing. To identify that set of policies and procedures/processes that serve as barriers to successfully pursuing and achieving goals, it is recommended that the HECC conduct (or sponsor the conduct of) what NCHEMS calls a "policy audit." Such an audit is a systematic review of policies and procedures done against a template of asking what it is about these policies that serve as barriers for outcomes attainment or as disincentives for institutions to undertake activities that would yield desired outcomes. The conduct of such an audit typically involves a thorough review of key statutes and policies and a series of interviews

with key informants—those individuals who, because of their positions, are keenly aware of what works and what does not in the implementation of state and institutional policies. In cases where NCHEMS has conducted such audits, a list of steps institutions, state agencies, and the legislature can take to improve overall performance has been developed. Experience indicates that legislatures respond positively to such lists because they detail productive actions that they can take at no or little cost.

8. **Strive to cultivate a culture of collaboration and mutual trust between and among HECC, universities, and colleges.** Oregon's public four-year sector is not far removed from major governance reform—the dissolution of the Oregon University System and the creation of the HECC. Such fundamental change is inevitably disruptive, and the impacts routinely linger for years as leaders change, practices and processes are reimagined, implemented, and revised. Institutions recently granted their independence resent the authority of a statewide entity when they perceive it to encroach on their flexibility, particularly when it exercises regulatory authority or takes up consideration of institutional funding streams. While this upheaval did not have the same profound effect on the community colleges, HECC absorbed the Department of Community Colleges and Workforce Development at the same time.[13]

   Research shows that coordinating boards, which sit between state policymakers and institutions, have a delicate assignment. They must urge sometimes uncomfortable change on institutions, including through their duty to make budget recommendations to the legislature, and simultaneously be a champion of the essential role that institutions (collectively and each in its own way) play in ensuring a healthy society and economy. Oregon is still adapting to its new way of managing its public investments in higher education, and given the challenge of the task, it is no surprise to us that there is room to improve the spirit of collaboration and mutual trust. Moreover, when the interests of independent institutions diverge, the fractures are more evident to the general public—or at least to key stakeholders—rather than being mediated within the confines of a single governing body. This raises the stakes for finding common ground and coherent ways forward. This spirit of collaboration is needed not just between the Coordinating Commission and the institutions, but also in the spaces between institutions and between the two- and four-year sectors.

   In any event, it is a reality that Oregon will continue to work through these issues as time passes. But where opportunities to accelerate this process are available, institutions and HECC should seize them. From NCHEMS' perspective, this is a recommendation that is as much a matter of style as of substance. It is a call for all parties to adopt a more intentional and consistent effort to engage on the basis of clear roles. For example, as it carries out its strategic action areas and identifies particular areas of special focus—developing/revising the state's strategic plan (and monitoring progress against it), refining and implementing finance models, coordinating articulation and transfer, improving

[13] It also absorbed the Oregon Student Assistance Commission at this time.

affordability for students, conducting visible advocacy for higher education in the legislature, etc.—HECC can double down on its efforts to work collaboratively with institutions to achieve solutions. At the same time, HECC should restrict its activities in areas less central to their role—functions that are legitimately within the purview of the Boards and management of institutions—without limiting its attention to ways that institutional collaborations can enhance services, streamline student experiences, and achieve efficiency. Meanwhile, individual institutions can recognize their own roles and limitations, focusing on those things at which they excel and contributing to HECC's efforts to organize a "best-fit" solution to challenges ahead. At points, this may require a final decision if consensus proves elusive, and when such conditions are found in the spaces between institutions, HECC may be called upon to make that decision. But any such circumstances should be preceded by ample consultation with the institutions.

Conclusion

Oregon is not taking full advantage of its major intellectual assets, its colleges and universities, to create a more prosperous, equitable, and attractive state. Creating such a state will inevitably require additional, targeted investments in its postsecondary institutions. But more important, it will require creation of a common vision for the nature of that desirable future state, the identification of the primary strategies for achieving that vision, and consistent use of available tools in ways that are reinforcing of each other.

Some of the recommendations presented are directed at the HECC and at state policymakers. Most, however, are directed to the leaders of Oregon's institutions of postsecondary education. Regardless of actions (or inactions) of others, there is much that college presidents can do to improve the well-being of the individual and corporate citizens of the state. Most of these actions will require changes to the old ways of doing things—most specifically shifting from competitive strategies to collaborative strategies and putting students, rather than institutions, at the center of decision-making. This will not be easy. It will require on-going demonstration of real leadership. In no way is this meant to be disdainful of the efforts institutions have made to these goals, or to deemphasize the need to take actions that strengthen institutions; rather it is a recognition that the best way to benefit the providers of education is to ensure that the beneficiaries of that education are successful and happy with their college experiences.

Appendix A. Background of the Study, Methods, and Conceptual Framework

Background

In late 2021, the Oregon Council of Presidents (OCOP) and the Oregon Community College Association (OCCA), circulated a Request for Proposals (RFP) seeking expert assistance in developing the insights needed to "facilitate transformation of Oregon's postsecondary terrain." Summarizing the requirements of the RFP, the OCOP and OCCA were seeking an organization that could:

- Develop an environmental scan regarding the factors affecting postsecondary education in the state. This is interpreted to mean the needs of students with particular attention to those not now being served, the workforce needs of state and regional employers, and the economic development needs of regions and communities in the state.
- Identify the areas in which additional educational or research capacities are needed and the ways in which the utilization of existing capacities can be improved to meet the identified needs.
- Assess the ways in which policies and practices at both state and institutional levels can be improved to serve the needs of the state and its communities more effectively and efficiently. This includes addressing the question of whether the methods of allocating state resources to colleges and universities should be modified to better support the varied missions of the institution and to better align funding with the priority needs of the state. This also raises the question of whether the structure of higher education in the state—or more likely, the allocation of responsibilities and authorities within the existing structure—needs to be adjusted to make higher education more responsive to societal needs.
- Suggest innovative ways in which the existing educational assets represented by public colleges and universities in the state, as well as other providers—school districts, proprietary schools, apprenticeship programs, and on-line providers—can be deployed to better serve students and employers and communities throughout the state.
- Develop a set of recommendations regarding the steps that should be taken to better align higher education with the needs of its various constituents and to maximize the effectiveness and efficiency with which needed services are provided.

All aspects of the work must recognize—and affirm—the shared values regarding the equity agenda for higher education in the state. The Oregon Equity Lens states that:

> We believe that everyone has the ability to learn and that we have an ethical and moral responsibility to ensure an education system that provides optimal learning environments that prepare students and learners for their individual futures.

We believe that our community colleges, university, and workforce training systems have a critical role in serving our communities of color, learners experiencing poverty, and other underserved populations.

We believe that the students and learners from currently and historically underserved communities represent Oregon's best opportunity to improve overall educational outcomes. We have many counties in rural and urban communities that already have populations of color that make up the majority. Our ability to meet the needs of this increasingly diverse population is critical to successfully reach our State education goals.

We believe that resource allocation demonstrates our priorities and our values and that we demonstrate our priorities and our commitment to communities of color, learners experiencing poverty, and other underserved communities, in the ways we allocate resources and make educational investments. We believe in focusing postsecondary education and training resources to serve Oregonians where they are and who they are, with a priority on communities and populations that have been historically underserved.

We believe that communities, students, parents, educators, and community-based organizations have unique and important solutions to improving outcomes for our students and educational systems. Our work will only be successful if we are able to truly partner with these stakeholders, engage with respect, authentically listen, and have the courage to share decision-making, control, and resources.

We believe every learner should have access to a full range of education and training options beyond high school, including apprenticeships, career certificates, and college degrees. These will show them multiple paths to employment yielding family-wage incomes without diminishing the responsibility to ensure that each learner is prepared with the requisite skills to make choices for their future.

We believe quality postsecondary education and training should be accessible and affordable for Oregonians, and students should not have to struggle with basic needs including, homelessness, housing insecurity, and food insecurity.

We believe in supporting education and training institutions in continuing to transform, expand, and redesign their outreach and delivery models to engage today's learners, including: communities of color; adults, parents, and other non-traditional learners; low-income populations; and other marginalized communities.

We believe the rich history and culture of learners and multi-lingual Oregonians are a source of pride and an asset to embrace and celebrate. We believe that speaking a language other than English is an asset and that our education system must celebrate and enhance this ability.

We believe in the critical importance of culturally responsive teaching and workforce diversification. An equitable education system requires providing educators with the tools and support to meet the needs of each student, and a dedicated effort to increase the culturally and linguistically diverse educators who reflect Oregon's rapidly changing student population. Our institutions of postsecondary education and training, and the P-20 system, will truly offer the best educational experience when their faculty, staff and

students reflect this state, its growing diversity, and the ability for all of these populations to be successful in their educations and ultimately in their careers.[14]

OCOP and OCCA selected the National Center for Higher Education Management Systems (NCHEMS) to conduct the project. In addition to its own staff, NCHEMS' project team included members of the Policy Analysis and Research unit of the Western Interstate Commission for Higher Education (WICHE).

Methods

In carrying out the project, NCHEMS worked closely with the staff leadership of OCOP and OCCA as well as with an Advisory Panel comprised of three university presidents and three community college presidents. This group provided guidance throughout the project and, at critical points, provided feedback and comments on the work products developed by NCHEMS.

The core work of the project was an extensive set of data analyses that served to place the economic and demographic conditions of Oregon and regions within the state, as well as of its public colleges and universities, in a comparative national and international context. Charts and graphs summarizing the results of these analyses we presented in an Interim Report submitted to OCOP and OCCA in February. Additional analyses were performed—and additional information displays developed—throughout the course of the project.

A curated set of this information was shared with stakeholders at a series of regional meetings conducted in early May. A trio of project team members visited university campuses; another pair met with representatives of groups of community colleges on one of the campuses in each region of the state. In each instance, team members met with institutional leaders, faculty, students, business leaders, economic and workforce development experts, and representatives of advocacy groups. At each site, key items of information were shared as the basis for eliciting responses concerning interpretation of the data presented, reactions to a list of issues presented, and suggestions for the steps needed to address those issues.

Based on the analytic findings and the feedback gathered in the course of the site visits, the NCHEMS project team developed a draft set of key findings and recommendations that was presented to the Advisory Panel as an incomplete final report on July 28, 2022. The panel members provided very useful feedback that resulted in the preparation of a revised document that was submitted to OCOP and OCCA on July 30. This document included not only findings and observations but answers to a set of specific questions presented in the RFP. This revised document was used as the basis for a final set of conversations with college and university leaders. Community college presidents were consulted as a group during their annual retreat in Astoria. University presidents and the leadership teams were consulted in a series of meetings on their individual campuses. The exception was Eastern Oregon University where the meeting was conducted as a Zoom meeting.

[14] This language includes updates to the Equity Lens that were adopted since the issuance of the RFP.

The long list of data analyses (more than 300 charts and graphs were developed in the course of the project) and the extensive consultations with stakeholders shaped the findings and recommendations presented in this report.

Organizational Context

A decade ago, Oregon made major changes in the governance structure of its higher education system, eliminating the Oregon University System, giving each university its own Board, establishing the Higher Education Coordinating Commission (HECC), and moving the functions of the Department of Community Colleges and Workforce Development and the Oregon Student Assistance Commission into the HECC. There were very good reasons for making these changes—allowing the universities to be more entrepreneurial and responsive to workforce demands in the state and their respective regions and boosting their capacity to raise funding from sources other than the state, among other benefits. However, this fundamental reorganization left a void, namely the weakening of connective tissue between the public institutions, which has exposed all of them to rapidly intensifying competition of the postsecondary marketplace without affording them an equal capacity to respond. These conditions have led to some arguments in favor of reconstituting the system—or at least a portion of it. But governance reform as a solution to the challenges of operating public institutions has been a far too convenient one, too quickly grasped, by states throughout the nation. In reality, states with diverse governance models are as capable of defining and implementing a clear agenda for leveraging postsecondary education to meet state needs as they are capable of floundering in exercising such leadership. Thus, large-scale governance structures are not in-and-of-themselves generally the source of the problem and, in any event, major changes inevitably cause significant disruption and take years—often decades—to settle.

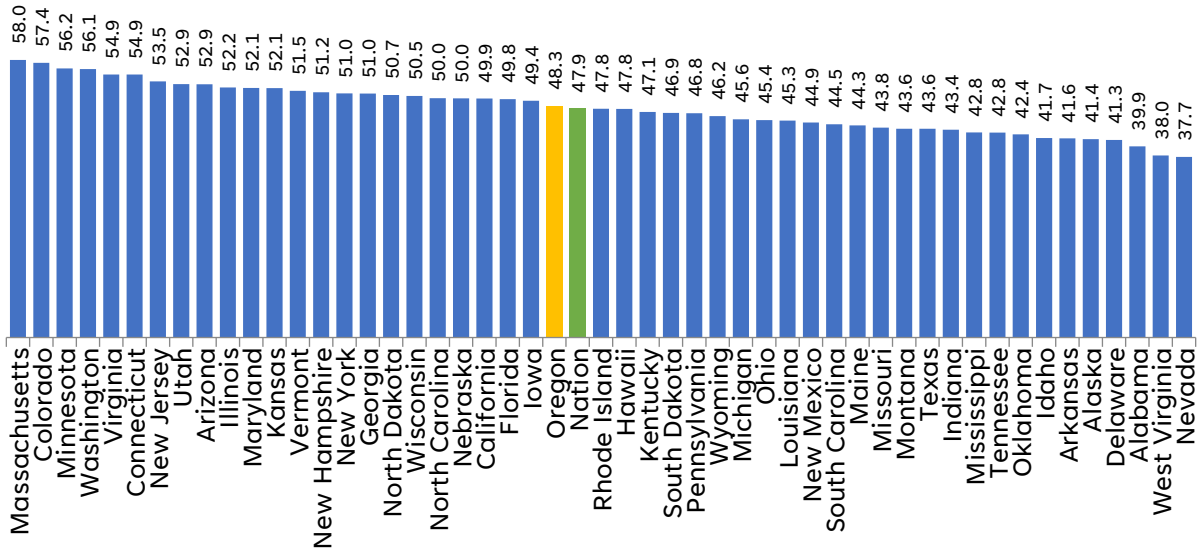
Instead, it is much more complicated than that. But regardless of the governance structure, continuous improvement can be achieved when there is a clear set of goals that have widespread acceptance and the available policy tools are utilized in ways that are aligned with those goals—they are applied in ways that reinforce each other.

Appendix B. The Context for Higher Education in Oregon

An important initial step in developing a set of recommendations for Oregon's public colleges and universities is to make some observations about Oregon, including a look at how conditions differ within the state and how they compare with other states and the nation.

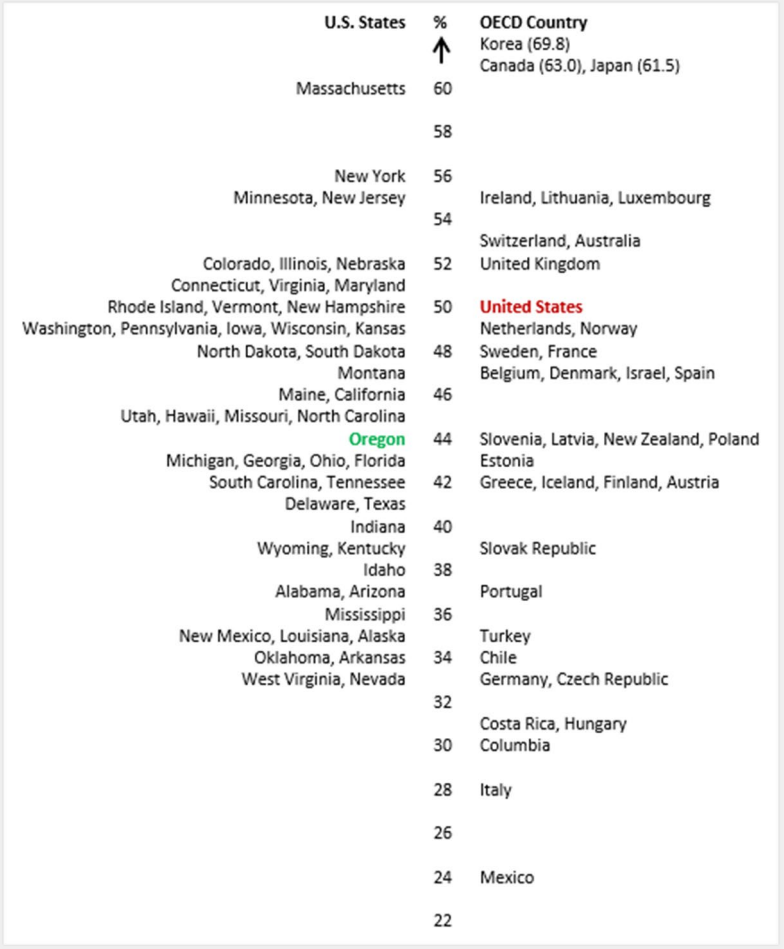
First, Oregon's educational attainment for working-age adults is comparable to the nation's as a whole (Figure 8). A closer look at the population of young adults tells a different, more troubling story, however: with that demographic, Oregon trails the nation significantly (Figure 9). Perhaps not coincidentally, Oregon is a net importer of college-educated talent.

Figure 8. Percent of Residents Ages 25-64 With A High-Quality Certificate or Higher, 2018



Source: U.S. Census Bureau, 2018 American Community Survey 1-Year Public Use Microdata Sample.

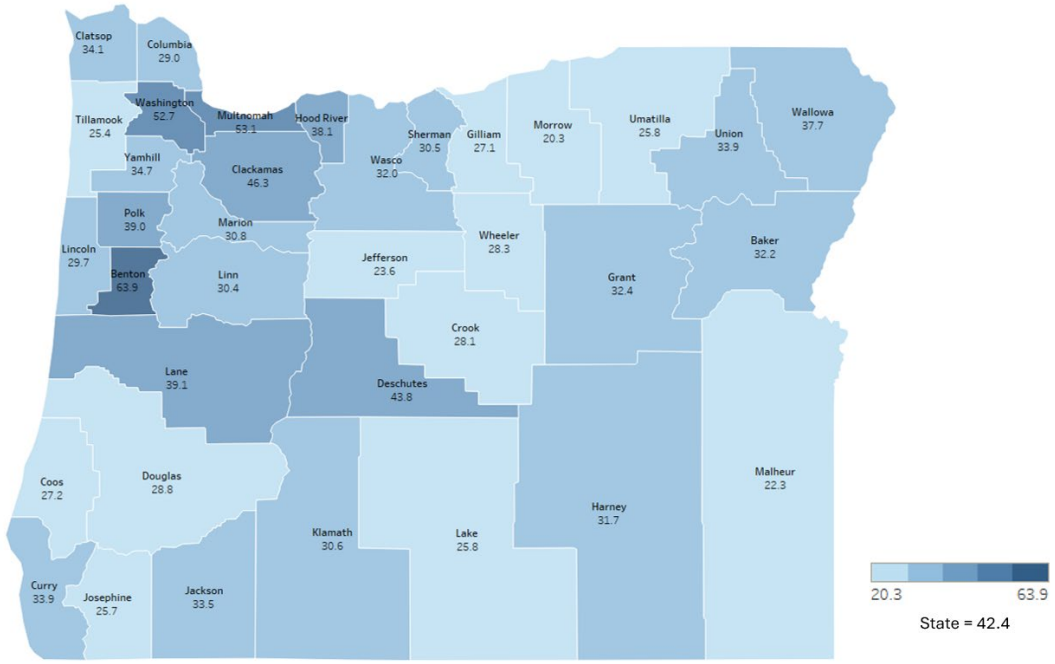
Figure 9. Tertiary Educational Attainment of the 25-34 Year Old Population, U.S., States, and Nations, 2019



Source: 2021 OECD Education at a Glance (for year 2019); U.S. Census Bureau, 2019 American Community Survey One-Year Estimates; Table B15001.

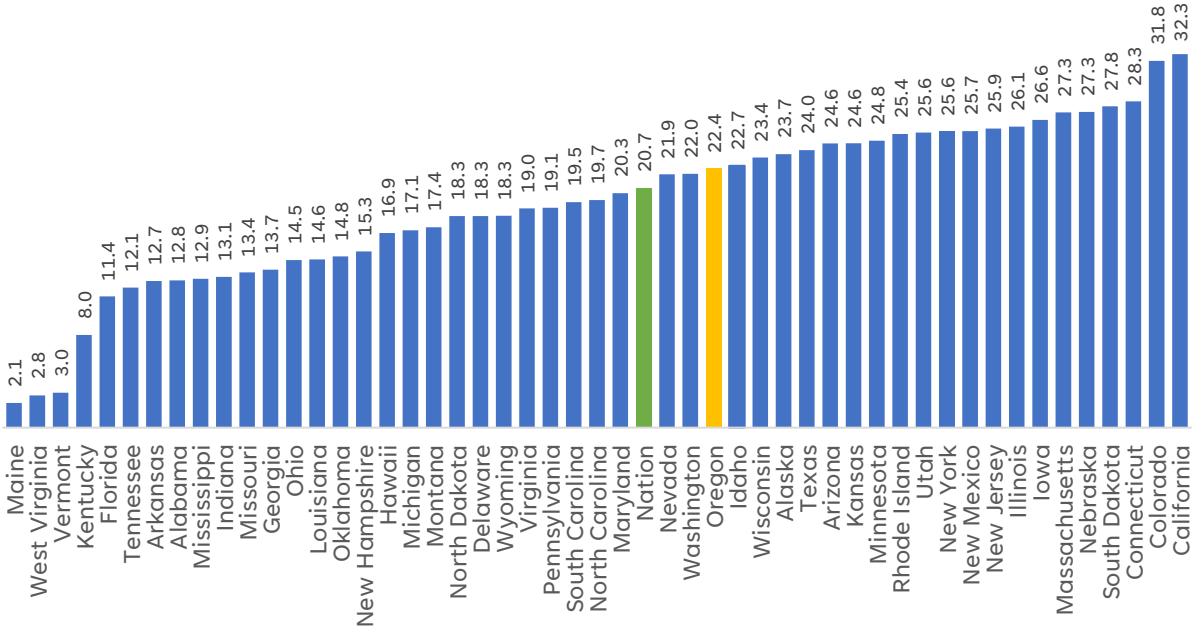
Educational attainment levels vary substantially across the state (Figure 10). The best-educated county is Benton County, with 63.9 percent of adults aged 25-64 with an associate's or higher degree, a proportion that is more than three times higher than the least-educated county, Morrow County. More generally, the northern half of the I-5 corridor, plus Deschutes County, is far better educated than the vast remainder of the state. Oregon also has a slightly higher-than-average gap in attainment rates by race/ethnicity (Figure 11). The gaps are especially acute for Hispanics.

Figure 10. Percent of Adults Aged 25-64 with Associate Degrees & Higher, by County (2013-17)



Source: U.S. Census Bureau, 2013-17 American Community Survey Five-Year Estimates; Table B15001.

Figure 11. Difference in College Attainment Rates Between Whites and Underrepresented Minorities, Ages 25-64, 2017-19

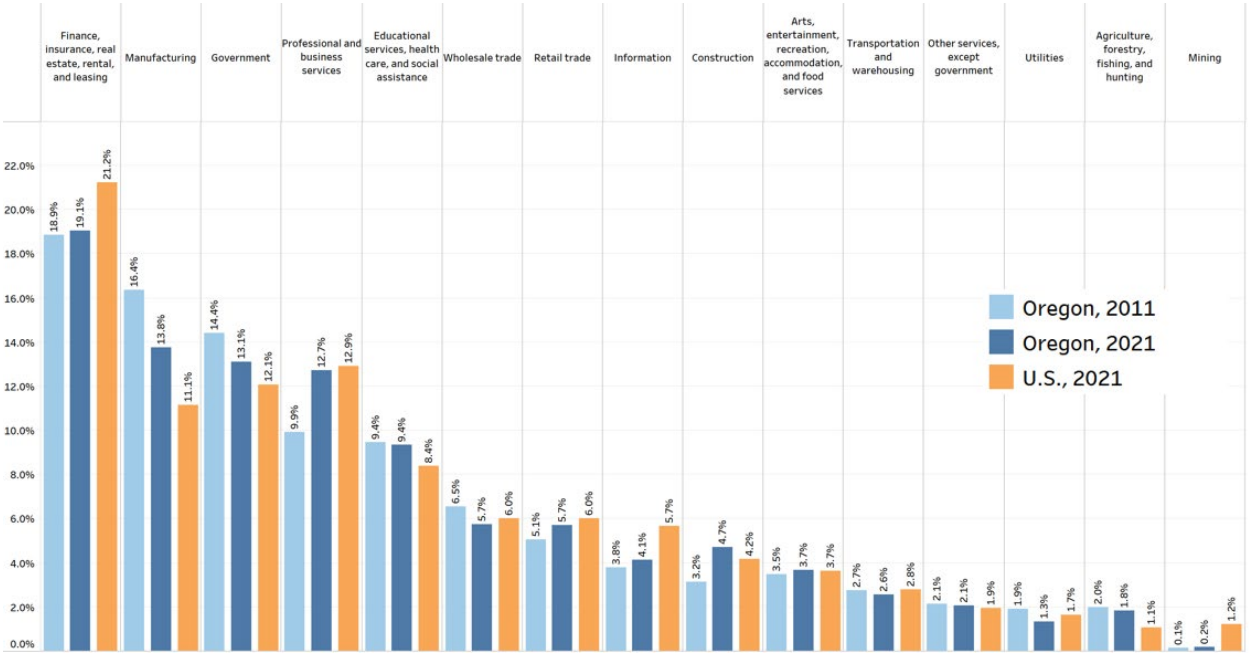


Source: U.S. Census Bureau, 2017, 2018, and 2019 American Community Survey One-Year Public Use Microdata Samples.

Oregon's economy has been changing over the last ten years (Figure 12). Two of the state's three largest industries are manufacturing and government. These two industries make up a larger

share of Oregon's Gross State Product than they do of the national Gross Domestic Product, yet both shrank as a portion of Oregon's economy from 2011 to 2021. At the same time, professional and business services, which is smaller in Oregon than it is nationally, grew to comprise a larger share of Oregon's economy.

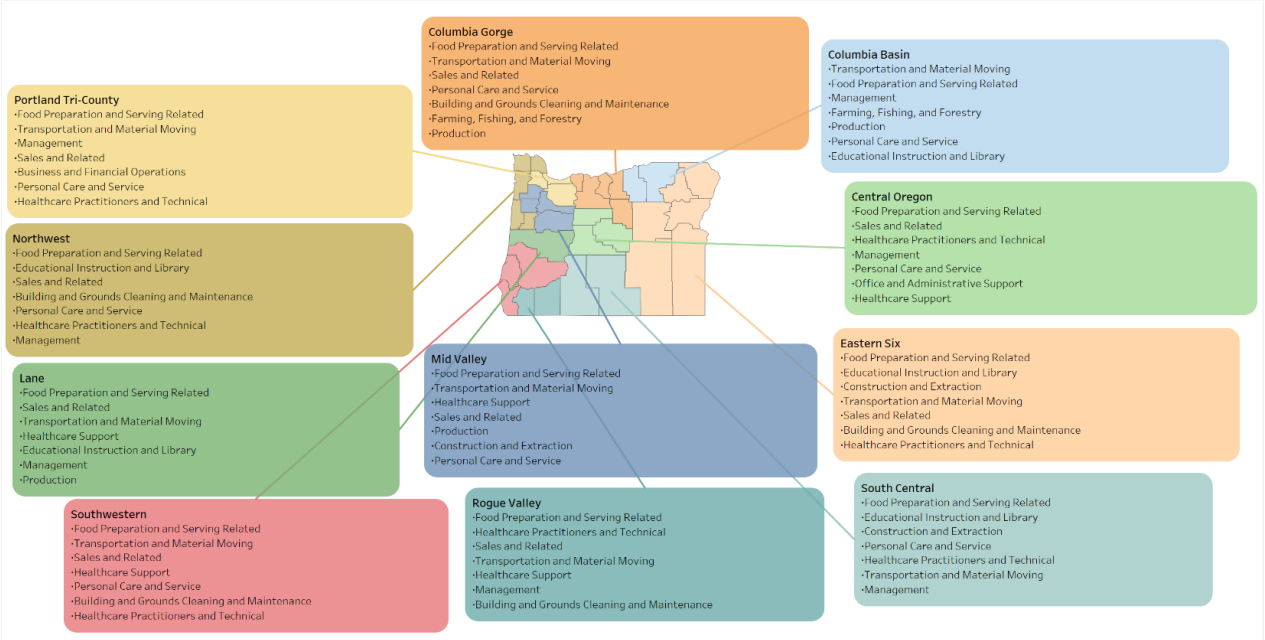
Figure 12. Percent of Gross State Product by Industry and Comparison to the Nation



Source: U.S. Bureau of Economic Analysis.

In terms of occupations, food preparation and serving occupations are projected to grow by the largest number of jobs from 2020 to 2030 in nine out of 11 of Oregon's workforce regions. Entry-level positions in this group of occupations, as well as most of the other top-growing occupations across all regions of the state, generally do not require a postsecondary degree (Figure 13). Many of the occupations in these clusters also experience considerable turnover or tend not to have wages sufficient to meet a minimum standard of living.

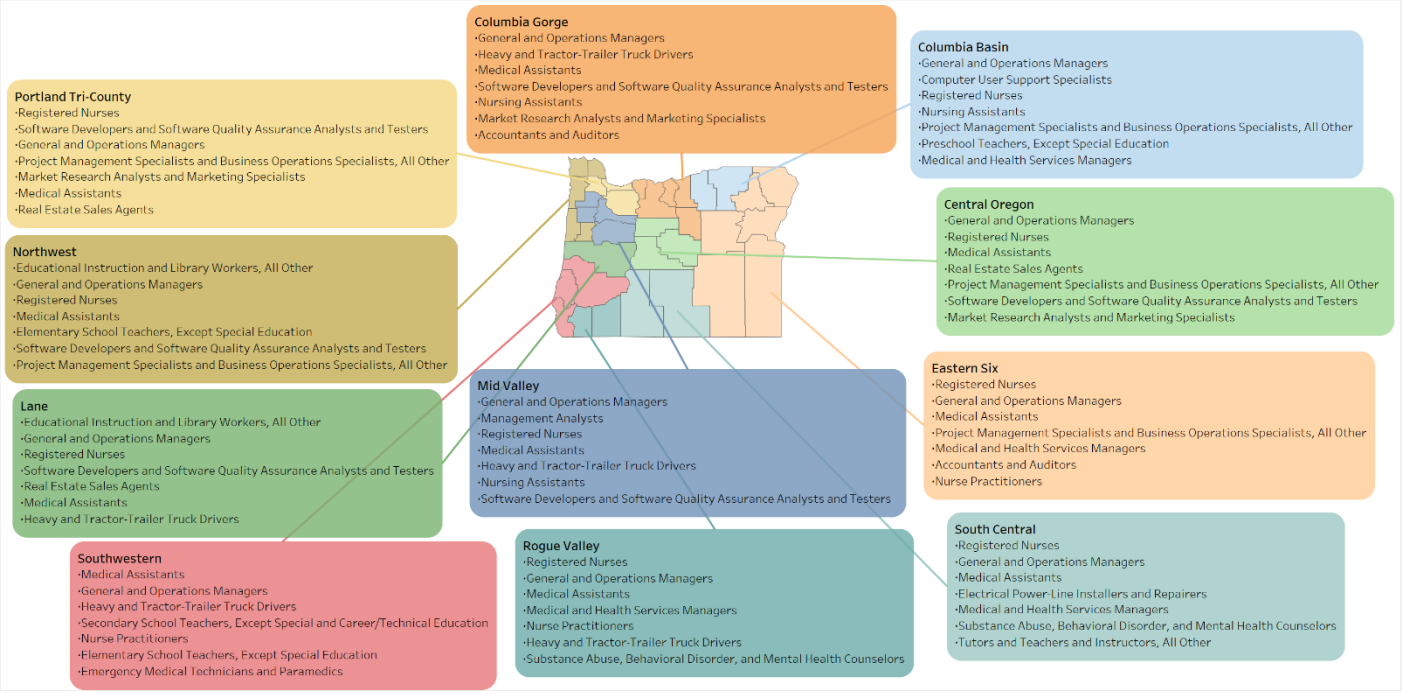
Figure 13. Occupations with the Largest Projected Growth, 2020-2030



Source: Oregon Employment Department, qualityinfo.org. Occupations are based on 2-digit SOC code.

Among occupations with a typical entry level requirement of a postsecondary certificate or degree, the occupations expected to grow by the most jobs between 2020 and 2030 include general and operations managers, registered nurses, medical assistants, and educational instruction and library workers (Figure 14). Regional variation in occupational demand is significant, with software developers and project managers near the top of the list in the northern I-5 corridor. Positions relating to manufacturing and logistics are in demand in the eastern parts of the state. Real estate jobs are expected to grow in Central Oregon and in Lane County. Across all Oregon regions, occupations in healthcare, business (e.g., project management, management analysts), and education are expected to grow.

Figure 14. Occupations Typically Requiring Postsecondary Education with the Largest Projected Growth, 2020-2030



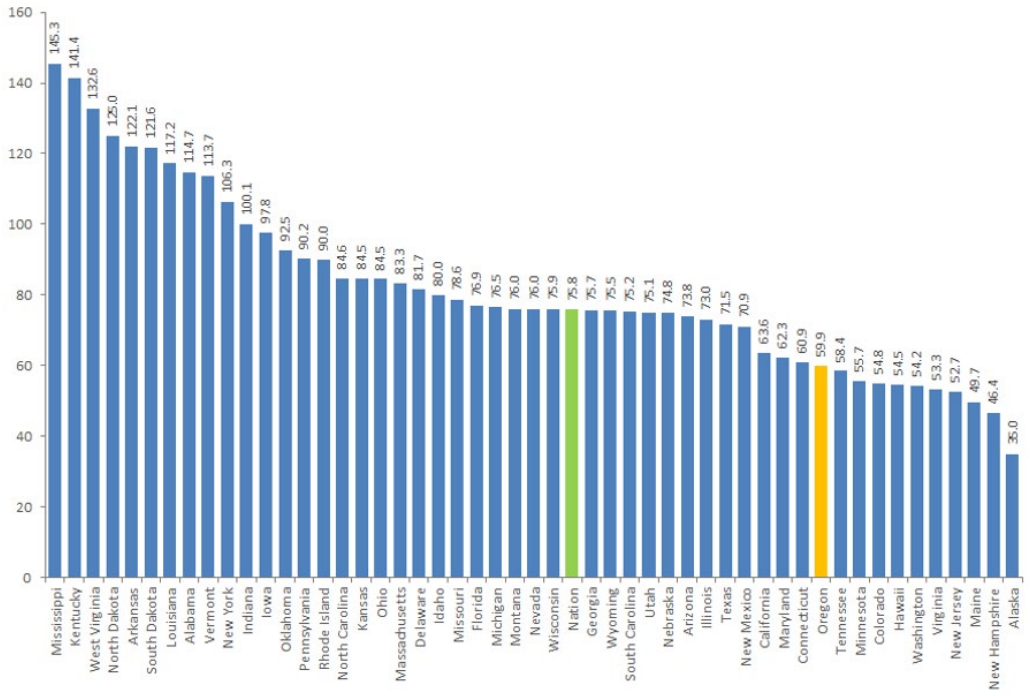
Source: Oregon Employment Department, qualityinfo.org. Occupations are based on 2-digit SOC code.

As Oregon's economy evolves and the workforce demands change along with it, there is a mismatch between the graduates of Oregon's postsecondary institutions and the state's workforce needs, both in terms of the number of graduates and the program areas in which they are earning degrees and certificates. This analysis of labor supply and demand is resistant to precise estimates. While there is a strong relationship between programs and occupations in some fields (such as in technology and health care) not all programs map neatly to specific occupations; some programs—especially those in the liberal arts—proudly declare their intention to educate graduates for a wide variety of work. It is also common for young people to swirl among occupations and industries before they settle into a career. But even though these facts make it a challenge to achieve perfect alignment between educational programs and workforce demands, it is important for states to use these analyses to improve this alignment as a condition of being competitive in a global knowledge-based economy.

In many occupations (depicted with their respective median incomes in Figure 17), Oregon's institutions of higher education are not producing enough graduates to fill jobs that require postsecondary education, which means the state relies on importing college graduates from elsewhere. This gap is especially acute in STEM and health fields, where the ratio of graduates to employees is notably below the national average (Figures 15-16). As occupations within those fields grow, this gap may grow even larger. There are also many more jobs in business, marketing, and management than there are graduates in these fields, though this gap is somewhat exaggerated since graduates from a wide variety of programs go on to work in those occupations,

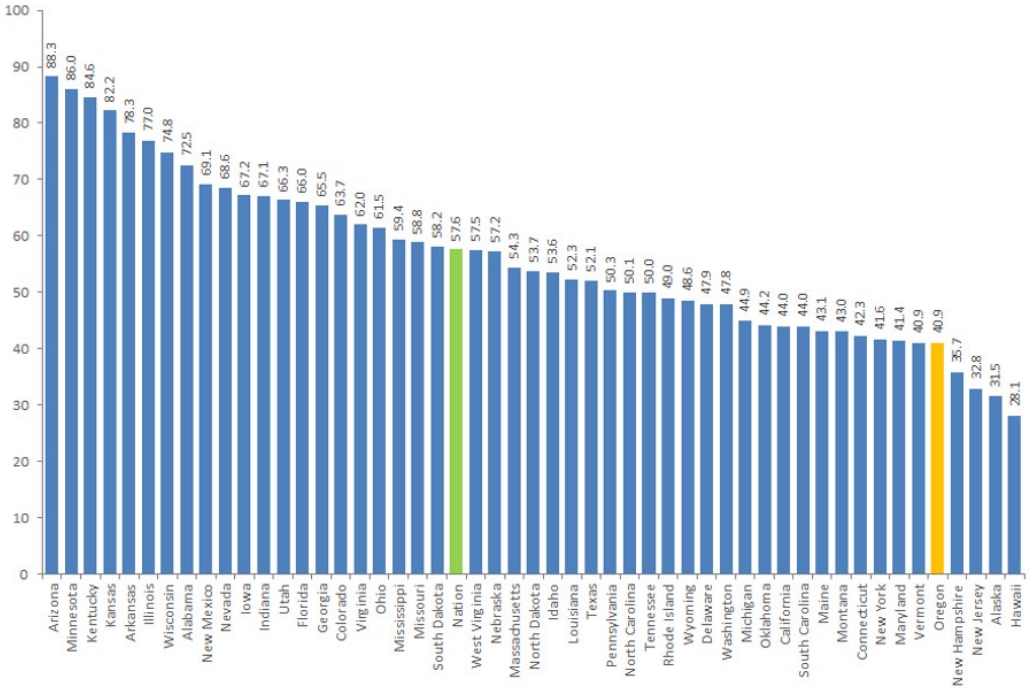
and many of the retail jobs serve as stepping-stones to individuals who are eventually destined for other professional careers.

Figure 15. STEM Credentials Awarded per 1,000 STEM Employees, 2018-19



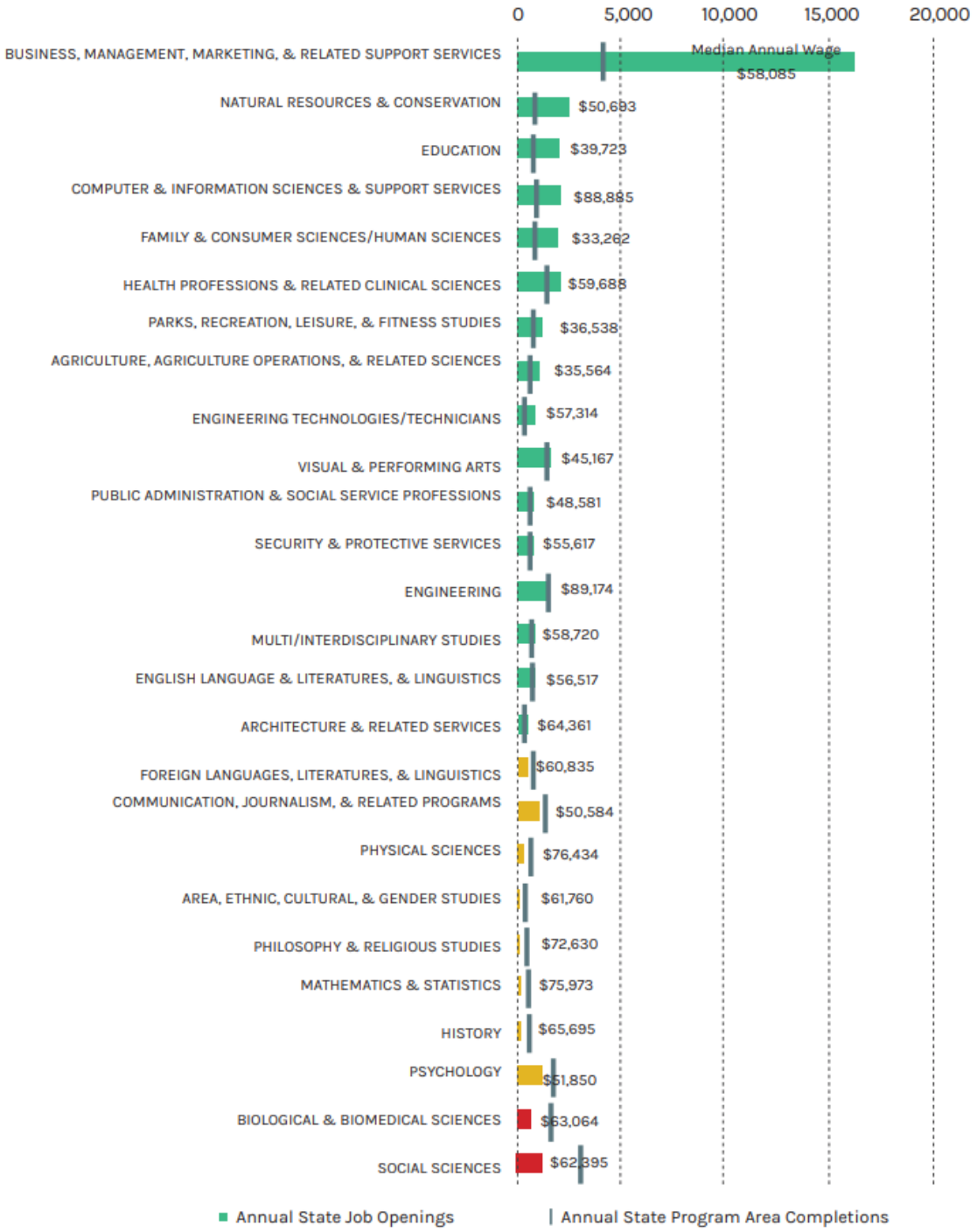
Source: NCES, IPEDS 2018-19 Completions File; U.S. Census Bureau, 2019 American Community Survey.

Figure 16. Health Credentials Awarded per 1,000 Health Employees, 2018-19



Source: NCES, IPEDS 2018-19 Completions File; U.S. Census Bureau, 2019 American Community Survey.

Figure 17. Occupational Supply and Demand, 2019



Note: This graph was included in the Oregon Strategic Capital Plan developed in 2019 using 2018 data for occupations and 2015-2017 data on completions. This chart has not been updated.

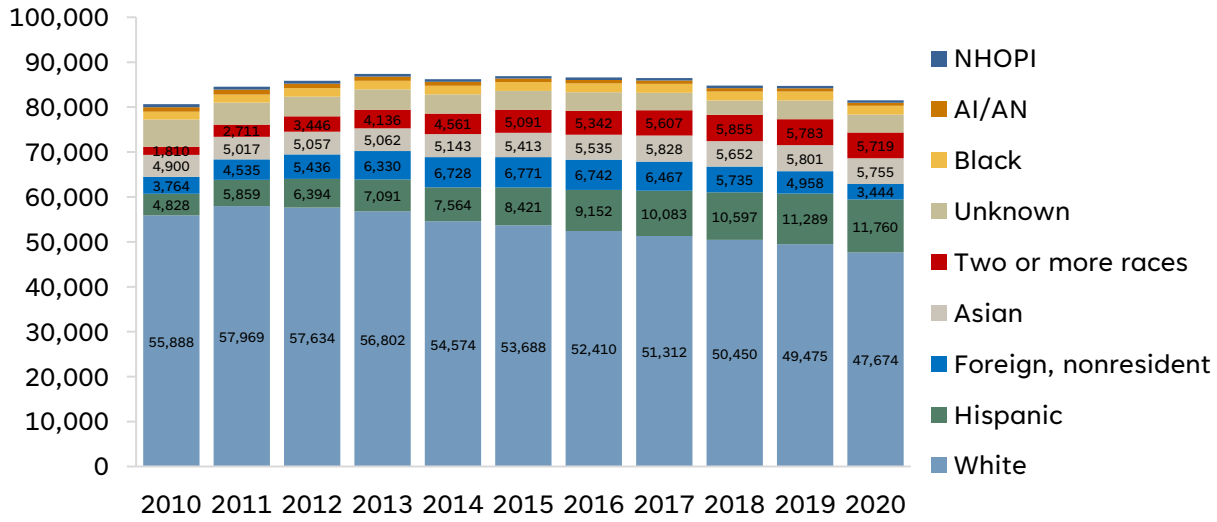
Source: EMSI; SmithGroup & NCHEMS (2019). *Strategic Capital Development Plan.*

Appendix C. RFP Questions & Answers

1. What are the expected patterns of demand for, and enrollment in, higher education in Oregon?

Recent trends indicate a sharp reduction in enrollment for Oregon institutions in recent years; most of that reduction has occurred among community colleges, but some of the universities are also dealing with serious downturns (Figures 18-22). In comparison to other states, Oregon's four-year sector has outpaced the modest enrollment growth the nation has witnessed, while the community colleges have seen deeper declines than the nation as a whole. The following charts show initial impacts on enrollment from the pandemic, but a fuller picture awaits the release of new data from NCES. In the meantime, the National Student Clearinghouse has shown that enrollment declines during the pandemic have been especially sharp among community colleges and broad-access four-year institutions.[15] Elite institutions and public flagships have fared far better in maintaining their enrollments. Impacts have also been especially heavy on students of color, low-income students, and adult learners around the country.

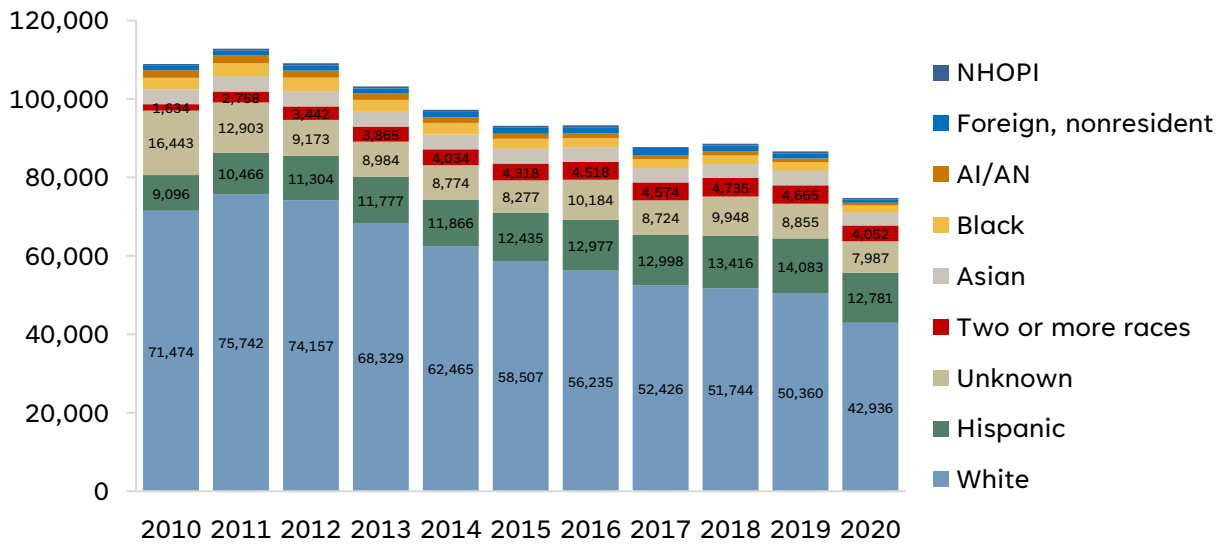
Figure 18. Oregon Undergraduate Enrollment, Public Four-Year Institutions, 2010-2020



Source: NCES IPEDS.

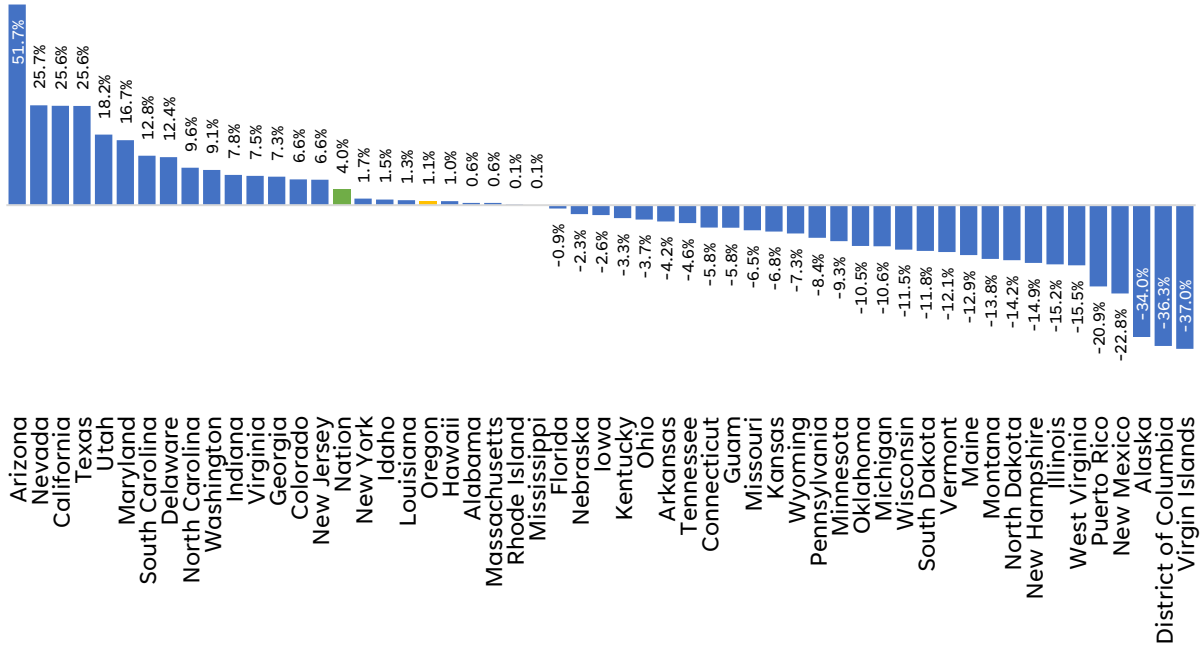
[15] See https://nscresearchcenter.org/publications/ for numerous publications and data tracking current term enrollment, rates of transfer, etc.

Figure 19. Oregon Undergraduate Enrollment, Public Two-Year Institutions, 2010-2020



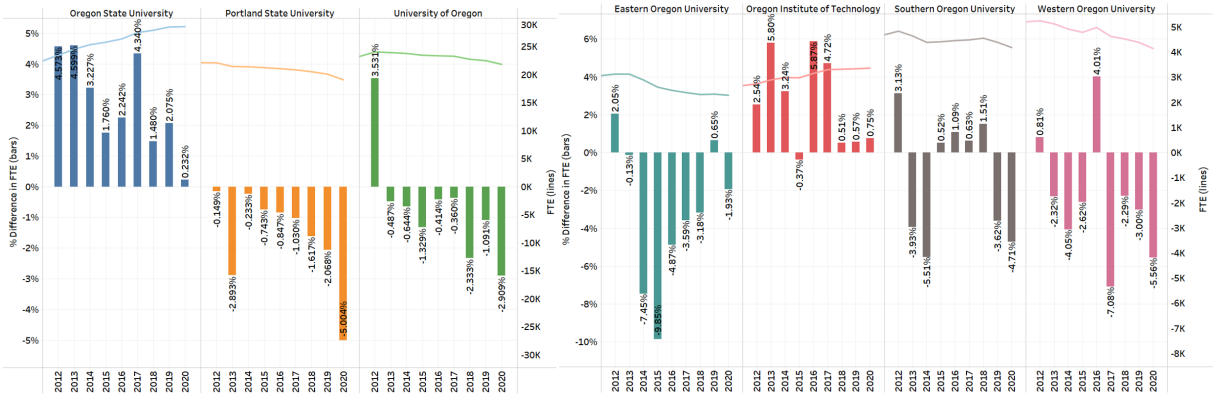
Source: NCES IPEDS.

Figure 20. Percent Change in Undergraduate Enrollment at Public Four-Year Institutions, 2010-2020



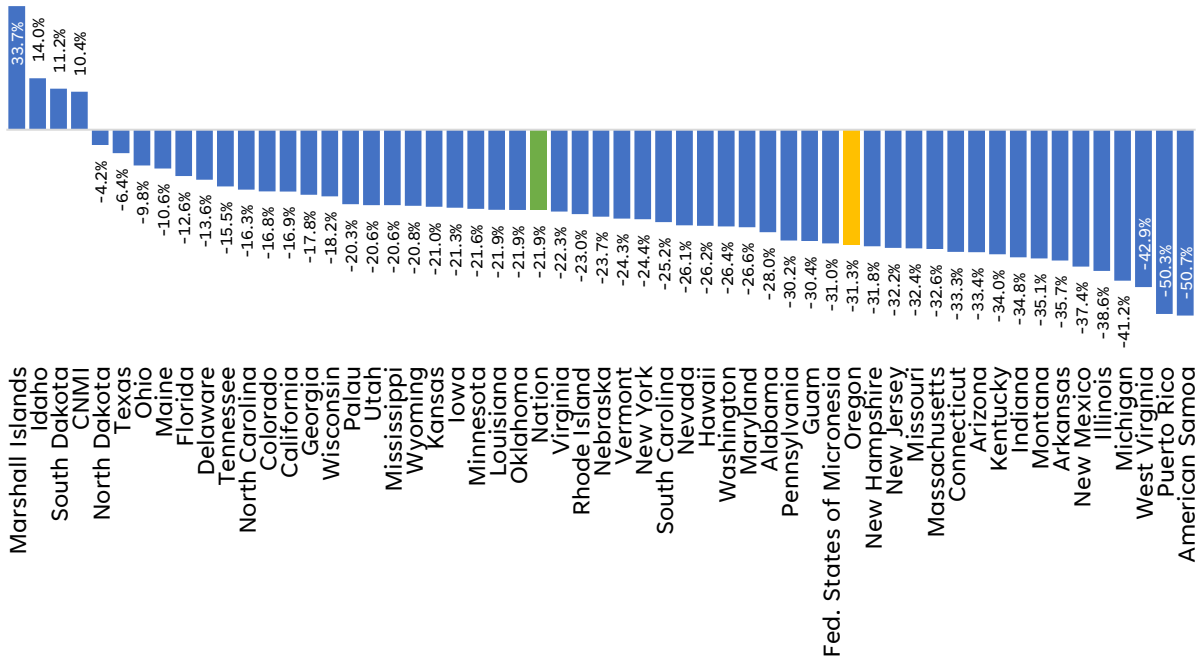
Source: NCES IPEDS.

Figure 21. Annual Student FTE Among Oregon's Public Four-Year Institutions, 2012-2020



Note: Bars represent year-over-year differences.
Source: NCES IPEDS

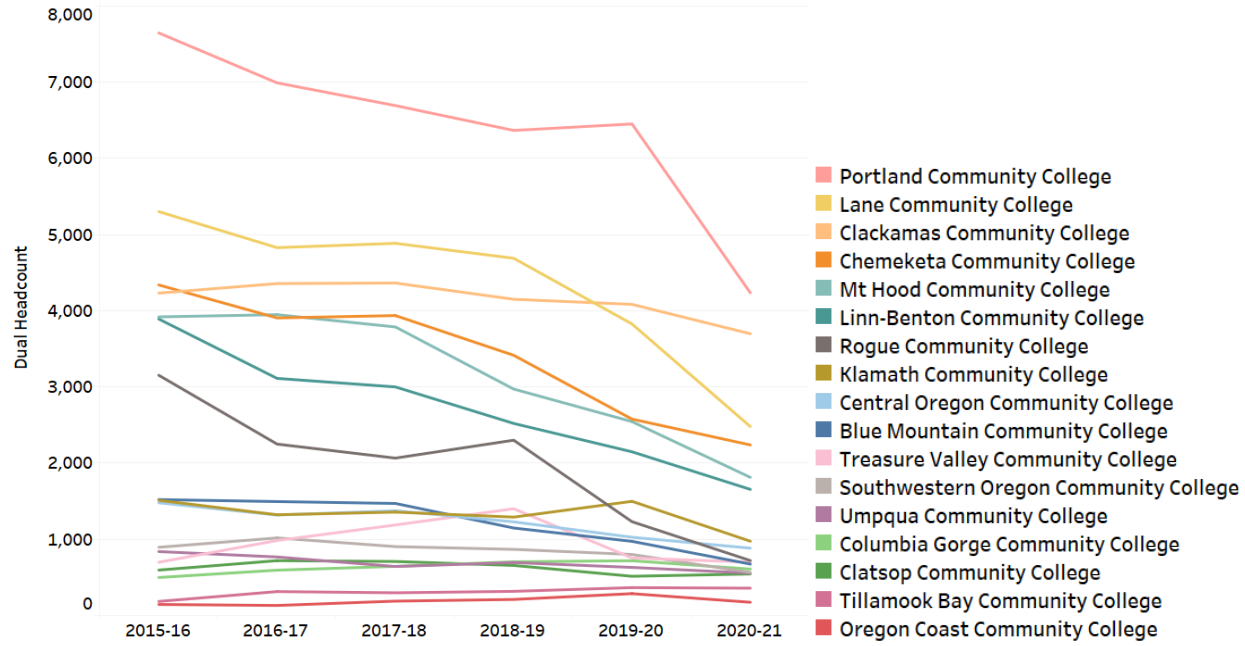
Figure 22. Percent Change in Undergraduate Enrollment at Public Two-Year Institutions, 2010-2020



Source: NCES IPEDS.

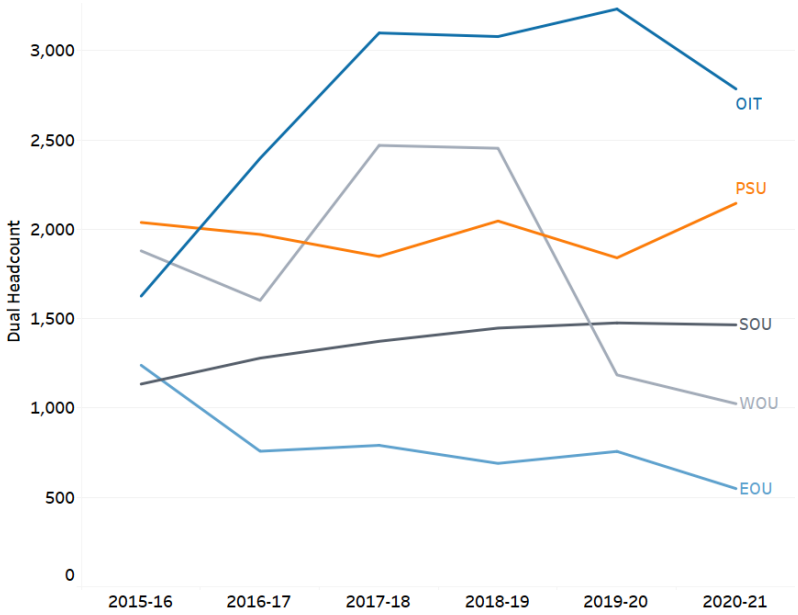
Accelerated Learning, or high school students enrolled in college credit, has also been generally declining for the past five years (Figures 23-24). The extent to which colleges rely on Accelerated Learning for enrollment varies; at Oregon's community colleges in 2020-2021, accelerated learning comprised between 11 percent (Portland Community College) and 51 percent (Tillamook Bay Community College) of total credit enrollment. At the universities, accelerated learning comprised between 10 percent (Portland State University) and 41 percent (Oregon Institute of Technology) of enrollment.

Figure 23. Community College Enrollment in Accelerated Learning



Source: HECC

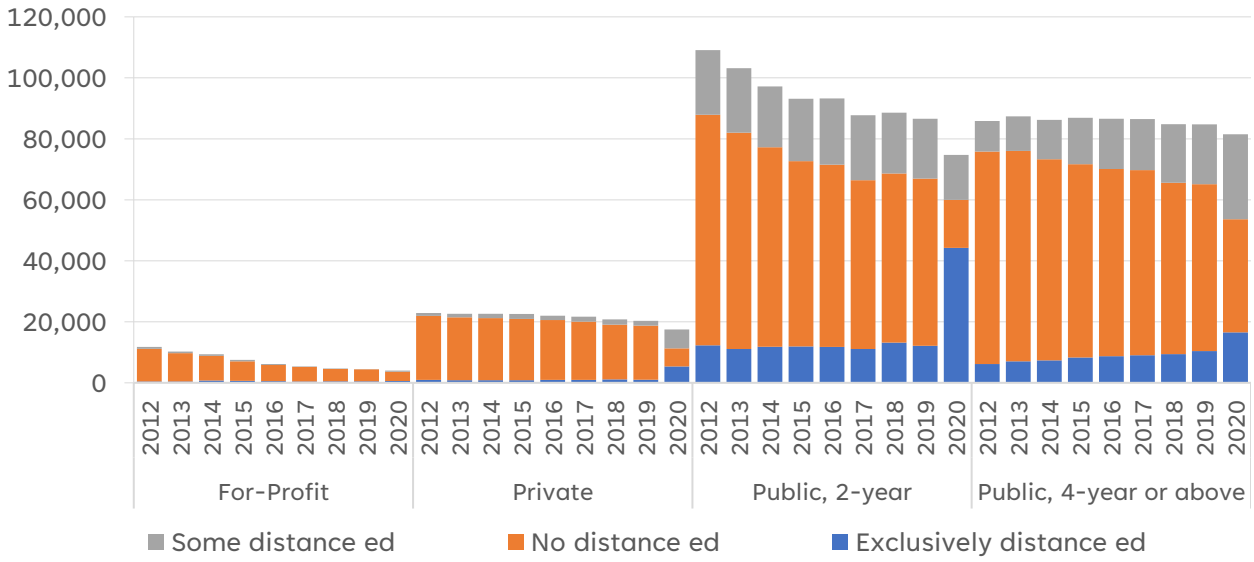
Figure 24. University Enrollment in Accelerated Learning



Source: HECC

While overall enrollment has been declining, almost all of the decrease has come from students studying exclusively in-person (Figure 25). Enrollment among students taking some or all of their classes via distance has generally either remained stable or increased. This trend started well before the COVID-19 pandemic, though it accelerated in 2020.

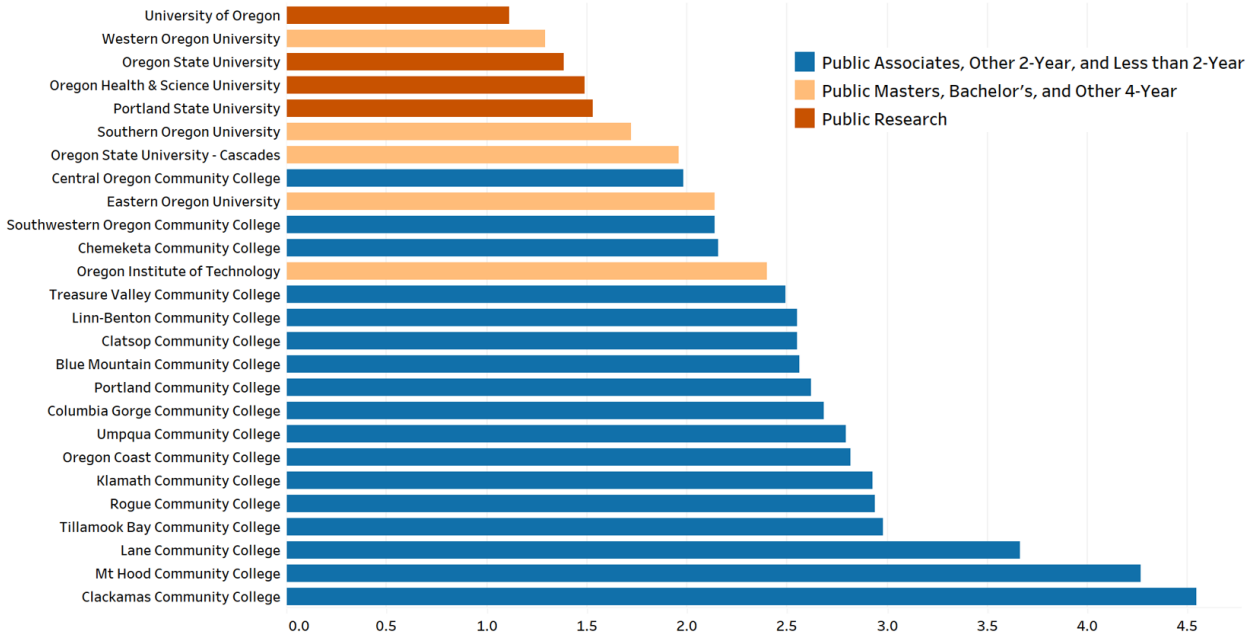
Figure 25. Undergraduate Enrollment at Oregon Postsecondary Institutions by Distance Education Status and Sector, Fall 2012 to Fall 2020



Source: NCES IPEDS.

Enrollment paints a different story when measured as headcount versus credits (FTE) (Figure 26). Institutions that enroll a larger percentage of part-time students will require more students to generate one FTE compared to institutions that enroll more full-time students. Overall, Oregon's four-year institutions have relatively lower headcount-to-FTE ratios compared to the state's community colleges, meaning the universities have lower percentages of part-time students. This can have important implications for funding. Some of the real costs facing institutions, such as credit instruction, are effectively measured based on FTE. Others, such as academic advising and financial aid processing, where a part-time student requires the same amount of institutional effort and services as a full-time student (possibly more since part-time students' are trying to follow a curriculum over a longer timeframe while juggling jobs and other life challenges), are better assessed based on headcount. Further, institutions that primarily serve part-time students will need to offer a different array of services, support, and academic offerings compared to those that serve primarily full-time students.

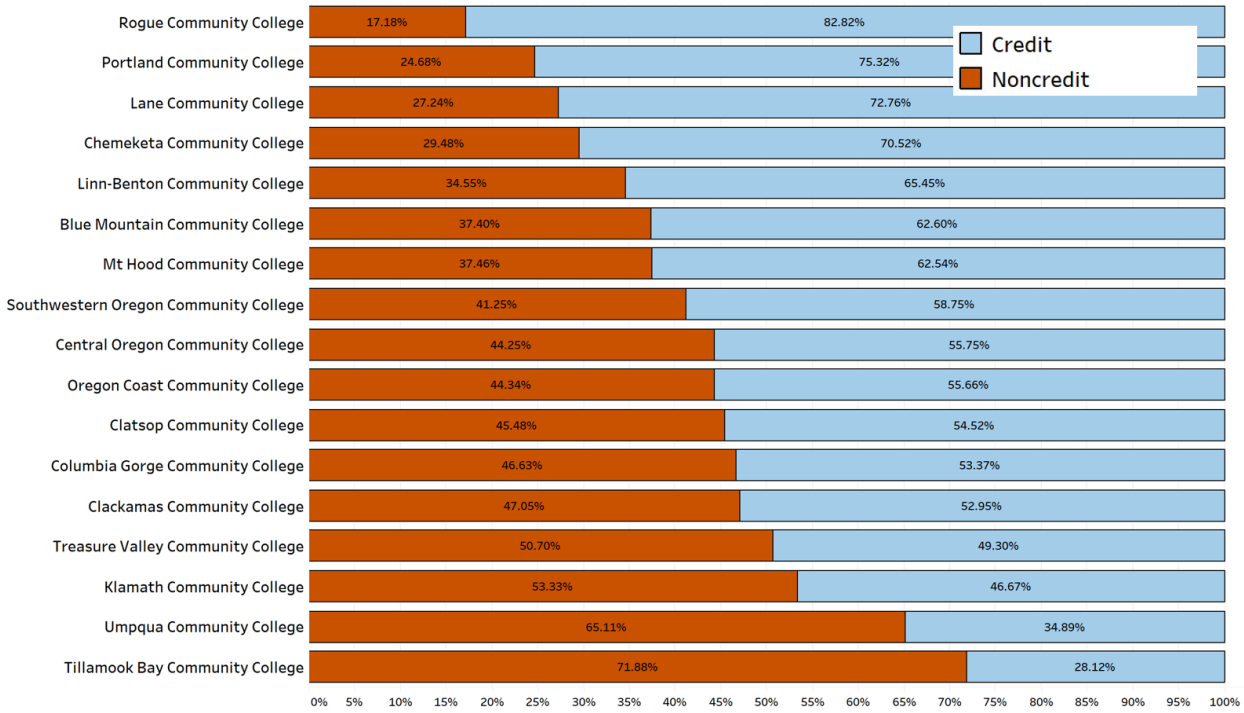
Figure 26. Undergraduate Headcount vs. FTE Enrollment, 2019-2020



Source: NCES IPEDS.

Oregon's community colleges differ from its universities, of course, but they also differ from each other as they strive to serve the unique needs of their individual service areas. The percentage of students enrolled in credit vs. noncredit course offerings varies markedly across the colleges (Figure 27). At Rogue Community College, over 80 percent of students are enrolled for credit, where at Tillamook Bay Community College fewer than 30 percent of students are taking credit courses. Non-credit programming includes both community education and also workforce-relevant programming, such as continuing education required for licensure in various professions. Non-credit programming is likely to grow as a share of the services offered by Oregon's community colleges as students seek to gain workplace skills as quickly as possible.

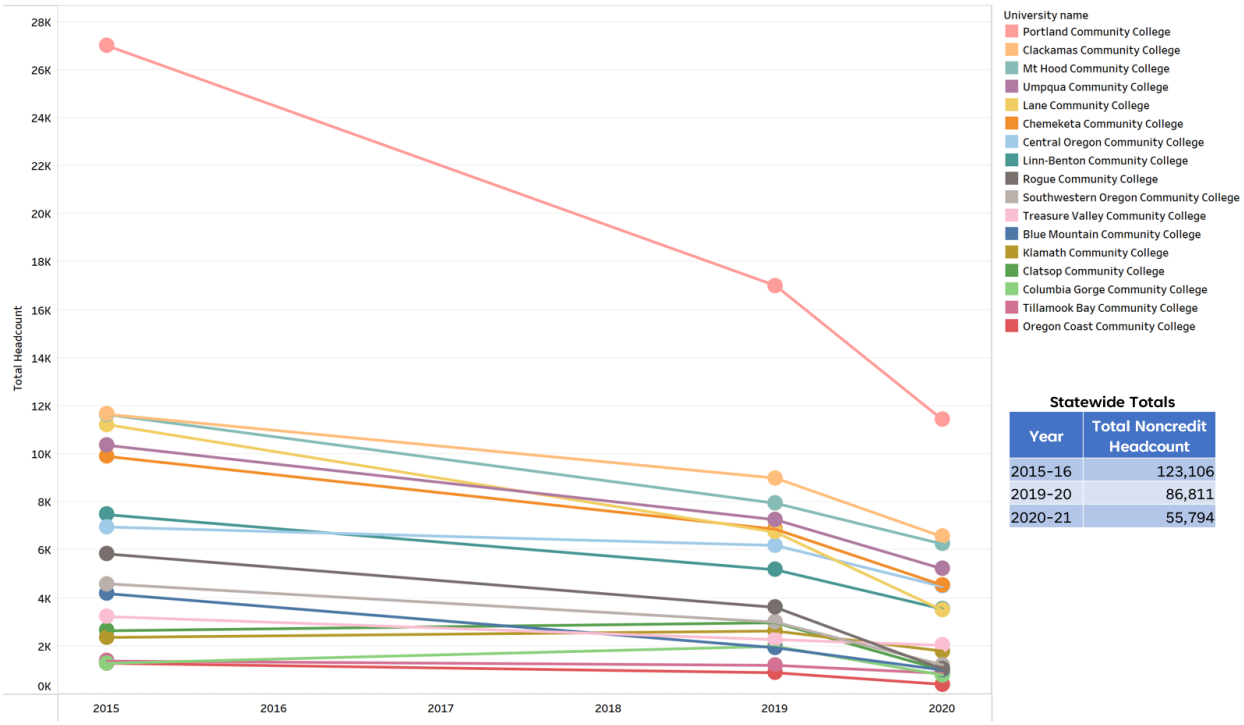
Figure 27. Credit vs. Noncredit Enrollment at Oregon Community Colleges, 2020-21



Source: HECC.

Since 2015, overall non-credit enrollment at Oregon's community colleges has decreased by 55 percent (Figure 28). This decline has happened across the state's colleges, though those colleges that rely more heavily on non-credit enrollment have seen greater impacts.

Figure 28. Noncredit Enrollment in Oregon Community Colleges Over Time



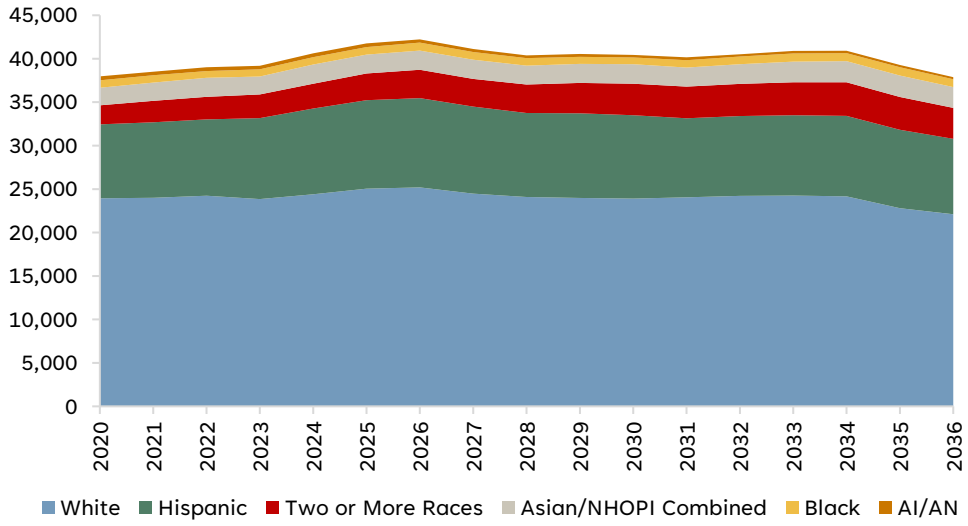
Statewide Totals

Year	Total Noncredit Headcount
2015-16	123,106
2019-20	86,811
2020-21	55,794

Source: HECC.

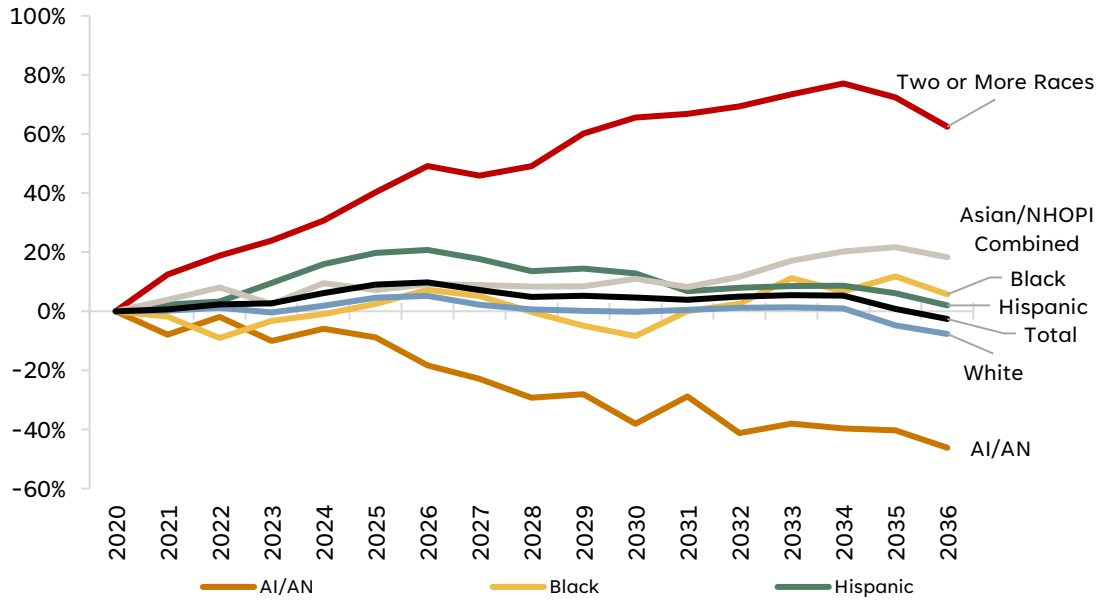
As in most other states in the nation, Oregon can no longer rely on a steadily increasing supply of high school graduates from which to draw students (Figure 29). Furthermore, the students who are the likeliest targets for college enrollment are rapidly diversifying as the projected pool of White high school graduates is expected to shrink as Asians/Pacific Islanders, Hispanics, and people of two or more races increase (Figure 30).

Figure 29. Projections of Oregon Public High School Graduates by Race/Ethnicity



Source: Western Interstate Commission for Higher Education (2020), *Knocking at the College Door* (10th Edition).

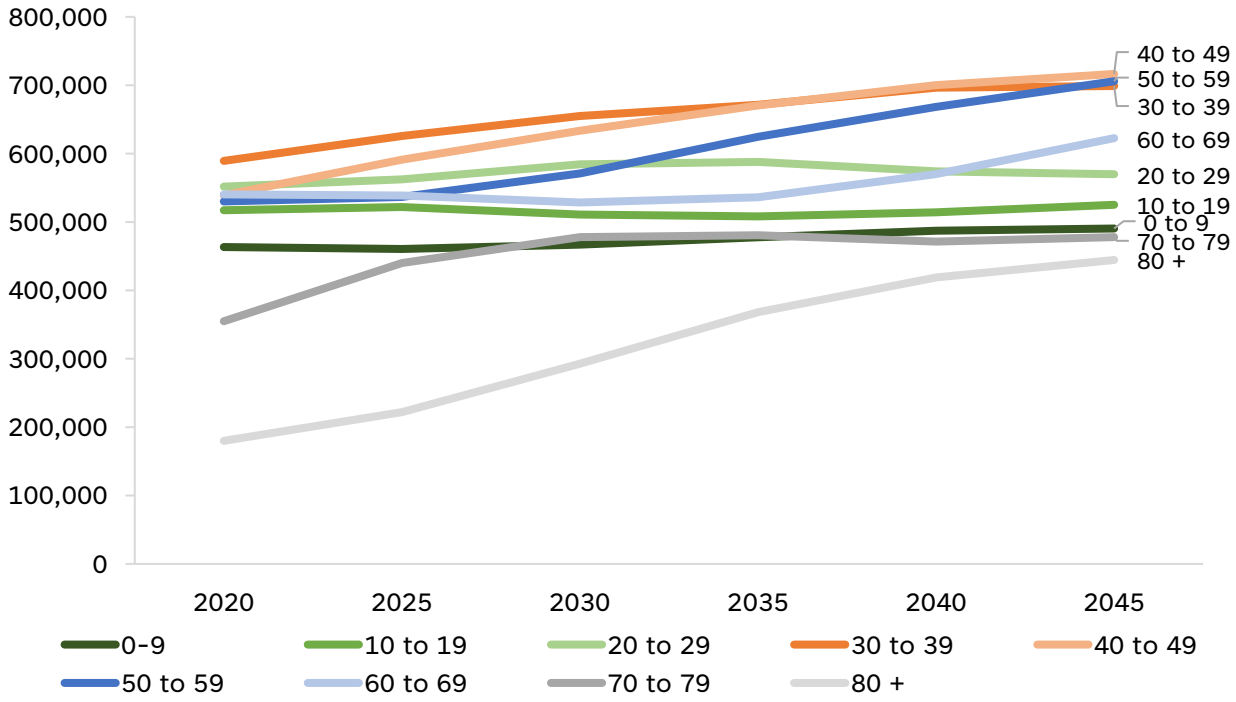
Figure 30. Projected Percent Change in Oregon Public High School Graduates by Race/Ethnicity



Source: Western Interstate Commission for Higher Education (2020), *Knocking at the College Door* (10th Edition).

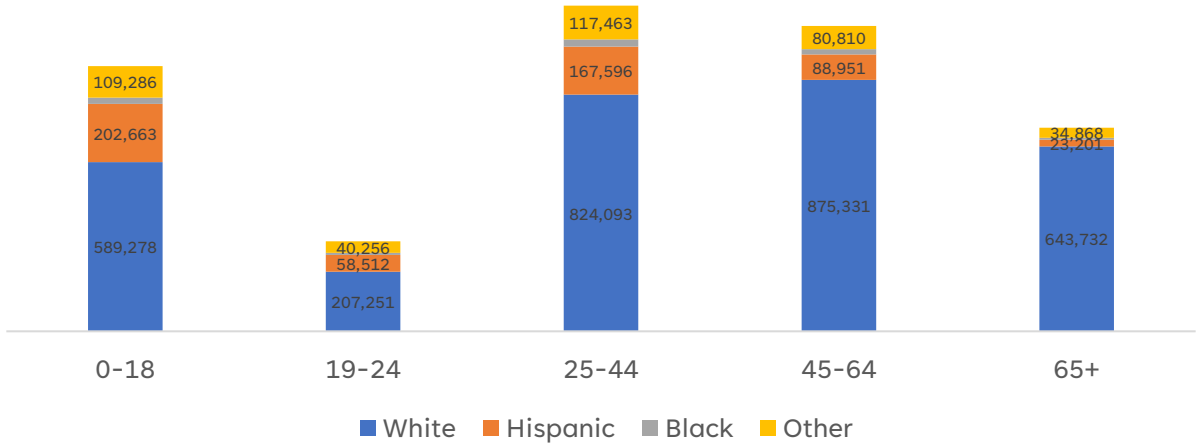
Compounding the pipeline challenge is the rapid aging and diversification of Oregon's population (Figures 31-32). Nearly all of Oregon's growth projected for the next 25 years will be among those over aged 30, while the growth in individuals—especially those of traditional college age—remains stagnant. In fact, the numbers of those aged 10-19 are expected to decrease. This portends significant challenges for Oregon's colleges and universities, if these trends cannot be changed. It also suggests that, in order to meet state workforce needs, Oregon will need to continue a strong focus on meeting the educational needs of its adult residents.

Figure 31. Oregon Population Forecasts by Age Group



Source: Portland State University, Population Research Center.

Figure 32. Oregon Population by Age and Race/Ethnicity, 2017



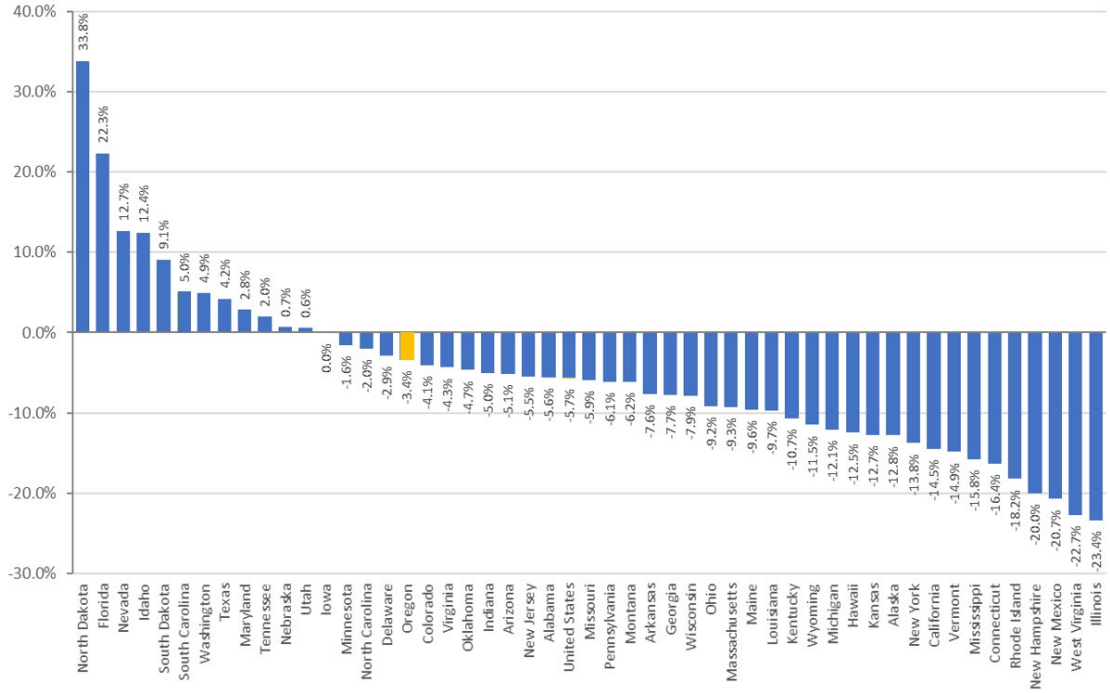
Source: U.S. Census Bureau, Population Division; SC-EST2017-ALLDATA6: Annual State Resident Population Estimates for 6 Race Groups (5 Race Alone Groups and Two or More Races) by Age, Sex, and Hispanic Origin: April 1, 2010 to July 1, 2017; File: 7/1/2017 State Characteristics Population Estimates; Release Date: June 2018

Unfortunately, there is little relief to be found in other nearby states that have traditionally supplied a large number of non-residents (and the tuition revenue they bring with them). After peaking in 2024, California is projected to see a decrease of 11 percent over the subsequent

decade, or roughly 55,000 graduates (Figure 33). By contrast, high schools in Washington will continue to produce a relatively stable number of graduates. In Idaho, rapid growth in the number of high school graduates is expected to stop abruptly after 2026. But together those two growing states only generate about 100,000 to 110,000 graduates, compared to California's total output of about 500,000 graduates.

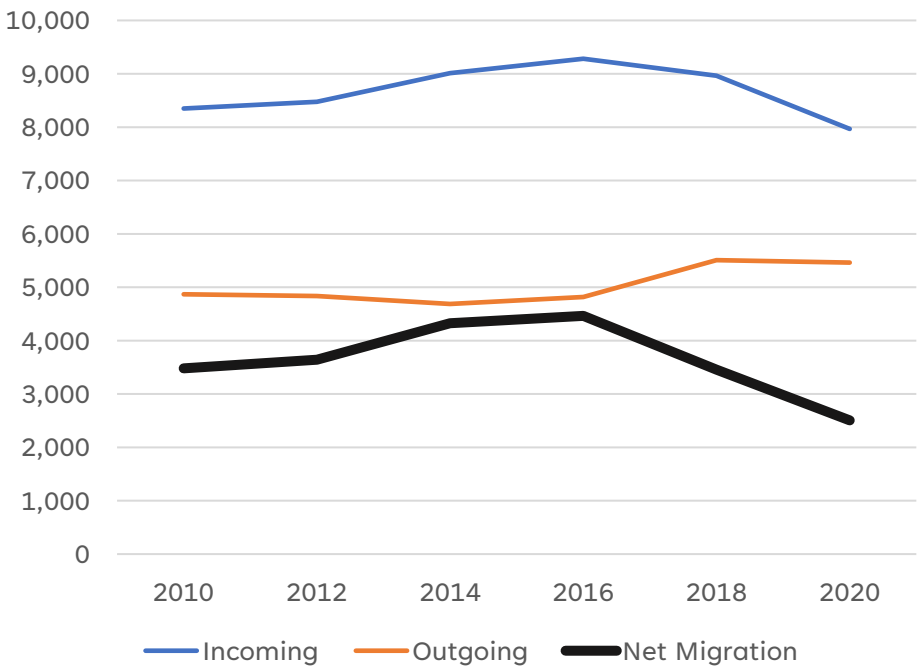
This dilemma is reflected in signs that the penetration of the out-of-state market by Oregon institutions may be softening. Oregon has historically been a net importer of students—its institutions attract more first-time students than they lose to other states. But since 2016, the net migration numbers have dropped by nearly 2,000 first-time students (Figure 34). This is due both to fewer students coming to Oregon from other states and also to larger numbers of Oregon students leaving for out-of-state institutions.

Figure 33. Projected Percent Change in High School Graduates by State, 2020-2037



Source: Western Interstate Commission for Higher Education (2020), *Knocking at the College Door* (10th Edition).

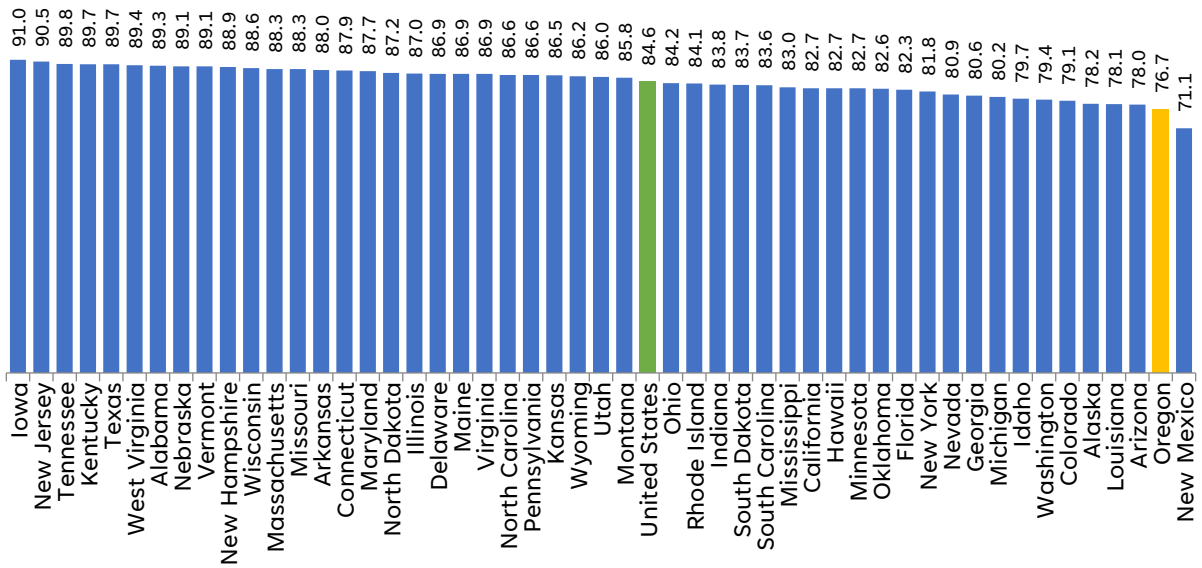
Figure 34. Oregon Net Migration of Postsecondary Enrollments, 2010-2020



Source: NCES IPEDS.

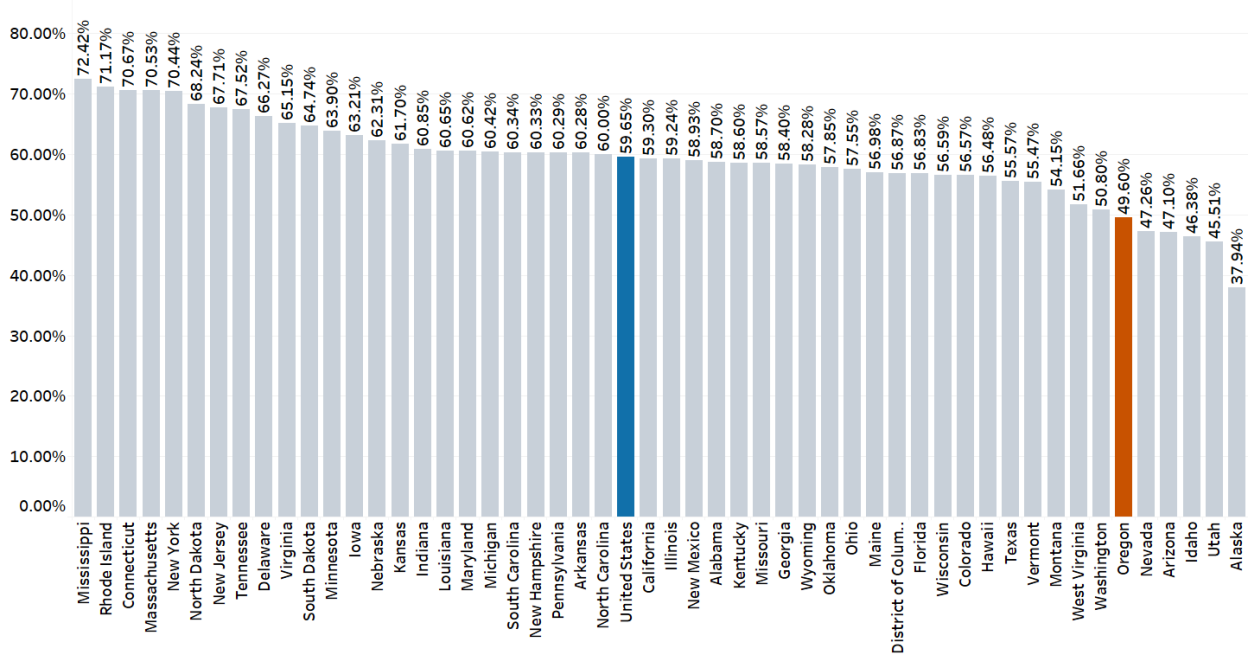
Oregon's education pipeline is also leaky at every transition point (Figures 35-38). It ranks among the lowest in the country in the proportion of ninth graders who graduate on-time from high school and in the number of recent high school graduates who go directly to college. Perhaps as a result of these leaks, Oregon performs much better at enrolling adults in postsecondary education; its rate hovers close to the national average (Figure 39).

Figure 35. Percent of Ninth Graders Who Graduate From High School Four Years Later, 2018



Source: U.S. Department of Education, Office of Elementary and Secondary Education, Consolidated State Performance Report. See Digest of Education Statistics 2018, table 219.46. Western Interstate Commission for Higher Education, Knocking at the College Door: Projections of High School Graduates; NCES IPEDS.

Figure 36. Percent of High School Graduates Going Directly to College, 2018



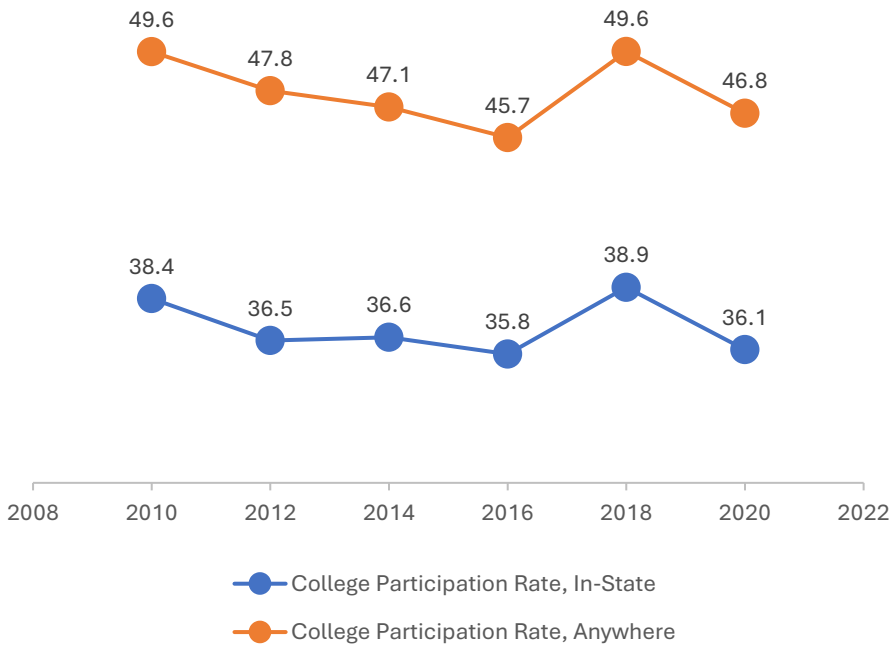
Note: Out migrants to foreign countries cannot be accounted for.

Sources: Western Interstate Commission for Higher Education, *Knocking at the College Door: Projections of High School Graduates*, 2020. https://knocking.wiche.edu/data/knocking-10th-data/ High School graduates from previous year (2017-18). NCES IPEDS. Fall 2018 ef2018c Final Release Data Files.

Additionally, college participation rates vary considerably across the state among Oregonians 18-44 based on their county of origin. The starkest difference is between counties on the eastern half of the state and those on the western side, with participation rates being considerably lower in the East. This is partially reflective of where the institutions, and the state population, is concentrated. But it also mirrors the variation in educational attainment and income. West of the Cascades, college participation rates do not show quite the same variation as the educational attainment rates in the southern part of the I-5 corridor. But there are also relatively lower participation rates in some of the counties along the coast and in Multnomah County, at least relative to the highest rates in the counties surrounding Portland and in the Willamette Valley.

The group of counties with the smallest share of residents attending an Oregon college or university overlap considerably with the list of those that are not part of a community college district. This is not true in every case, but Gillam, Wheeler, Grant, Wallowa, Baker, Harney and Lake counties have relatively lower college participation rates compared to other counties and are also not part of a community college district. Distance is also a barrier for residents of these counties to enroll in face-to-face programs.

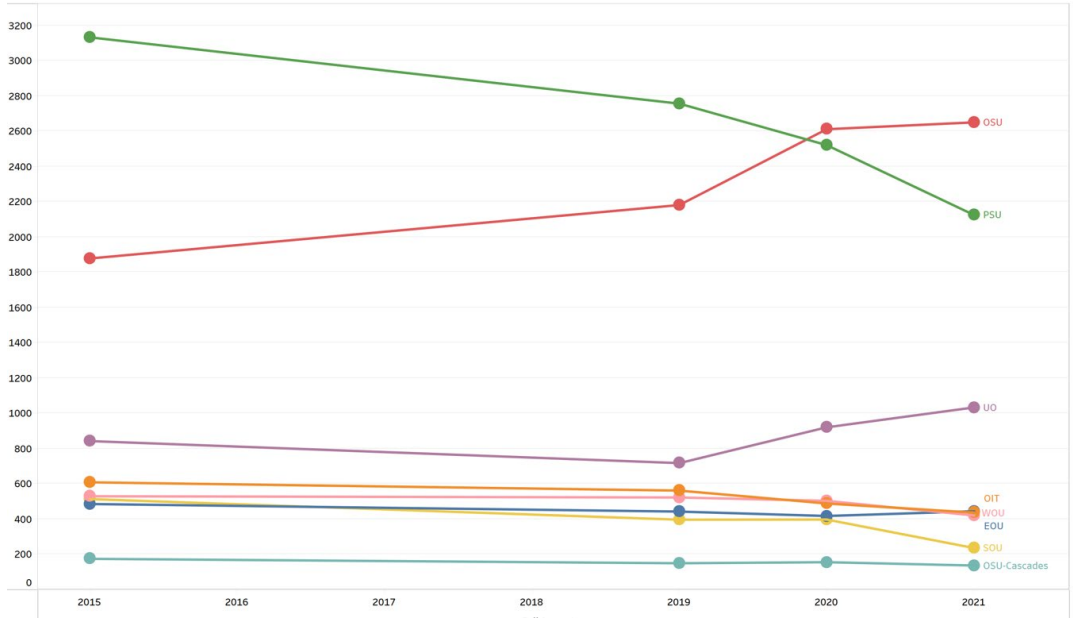
Figure 37. College Participation Rates of Recent High School Graduates by Year



Sources: WICHE *Knocking at the College Door*, 2020. NCES, IPEDS Fall Residency and Migration Enrollment Files, 2010 through 2020.

The two most popular in-state transfer destinations for Oregon community college students are Portland State and Oregon State; the University of Oregon is a distant third. These patterns have been changing, however. In 2015, Portland State enrolled over 1,000 more transfer students than did OSU; by 2020, more community college students were transferring to OSU than PSU.

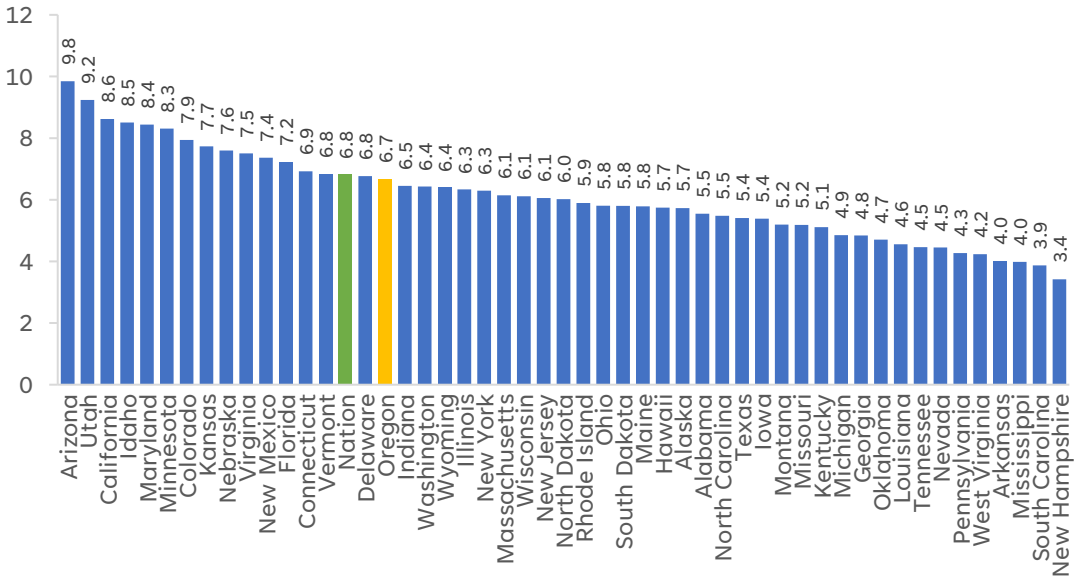
Figure 38. Transfers to Oregon Universities, by Destination



Source: HECC

Compared to the nation overall, Oregon institutions enroll a roughly equivalent percentage of the adult population aged 25-49 without a degree. As noted earlier, however, participation rates vary among Oregon counties, and adults in the eastern half of the state are much less likely to be enrolled in college compared to those in the west (Figure 40).

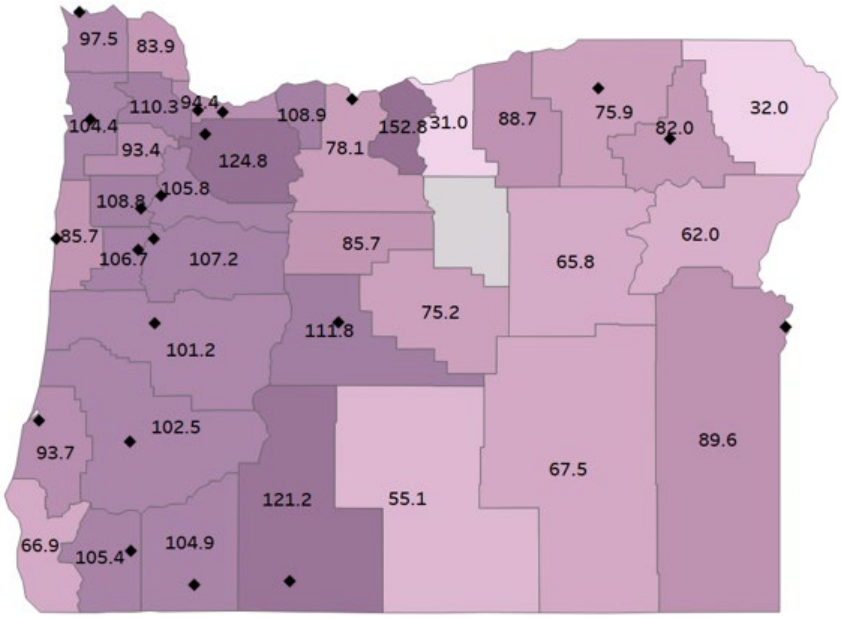
Figure 39. Undergraduate Enrollment Age 25-49 as a Percent of Population Without a Postsecondary Degree, Fall 2019



Note: Data are for the population with less than an Associate's degree.

Sources: NCES, IPEDS Fall 2019 Enrollment File; ef2019b Provisional Release Data File; U.S. Census Bureau, 2019 American Community Survey One-Year Public Use Microdata Sample.

Figure 40. Oregon Undergraduates at Public Institutions by County of Origin per 1,000 Residents Aged 18-44

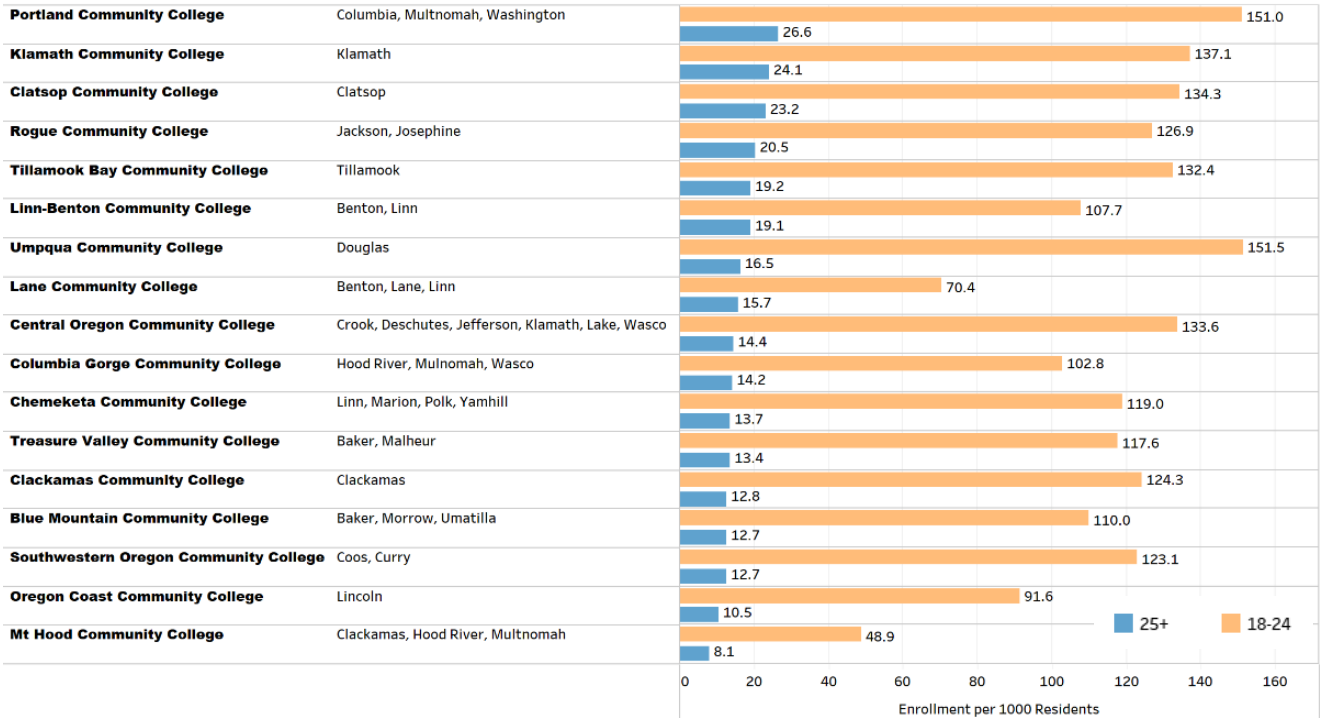


Note: Data have been suppressed to avoid cell size limitations. Diamonds indicate the location of the main campus of an Oregon public institution.

Sources: U.S. Census: 2019 Annual County Resident Population Estimates by Age, Sex, Race, and Hispanic Origin: April 1, 2010 to July 1, 2019 (CC-EST2019-ALLDATA); HECC.

The extent to which Oregon's community colleges enroll students from traditional (ages 18-24) and non-traditional (age 25+) age groups varies significantly by college (Figure 41). Oregon's largest community college, Portland Community College, served the largest percentage of non-traditional students in its service area in 2019, as well as the second-largest percentage of traditional-aged students. Some other institutions do a relatively better job at reaching traditional-aged students (e.g., Umpqua) or non-traditional-aged students (e.g., Klamath) in their regions. Worth noting is that some of the variation is undoubtedly due to overlapping geographic areas that are not consistent with the college's service areas. For instance, students from Multnomah County make up a relatively large proportion of Mt. Hood's total enrollment, but many of those students have a closer option in Portland Community College and the most populated parts of that county (including the City of Portland itself) is not in Mt. Hood's service district.

Figure 41. Community College Enrollment per 1,000 Residents With Less Than an Associate's Degree, by Age and Geography, 2019



Note: Community college service district boundaries are not uniformly consistent with county borders.
Source: HECC

Given these findings, Oregon's colleges and universities face important priority questions, as does the state's policy leadership. They include:

- What does Oregon see as its relationship between itself and its public institutions?
- How is the state going to partner with Oregon's institutions to substantially boost the rates at which its high school and GED students successfully graduate and enroll in college?
- How can Oregon's universities continue to be successful at providing affordable, quality programs to residents while also attracting nonresident students to their campuses? And how can the state improve the chances that graduates will stay after graduation and contribute to the Oregon's economy?
- How can Oregon's community colleges arrest the rapid decline in enrollment among credit students? In particular, how can policymakers and community colleges ensure that those who need a postsecondary education are not facing shrinking educational opportunities at community colleges, especially underserved groups who make up a growing proportion of the state population?
- How can community colleges better meet the needs of adult, part-time students by serving more of them and preparing them for a changing economy?

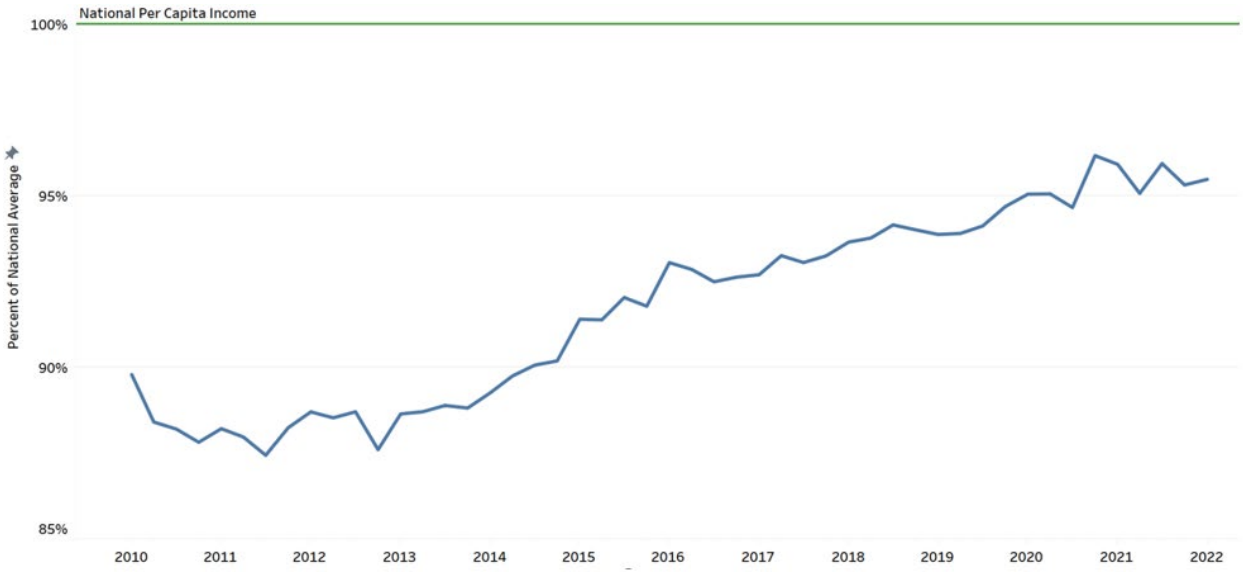
- Is there a shared understanding among institutions and with the state's policy leadership about how projected enrollment demand will be accommodated and by which institutions? Should there be?

2. Can the state's various funding models for higher education be structured and administered to maximize the return on investment for the state and contribute to advancement of higher education's core principles and missions?

In the four-year sector, HECC uses a funding model that in recent years has elevated the influence of performance funding on the determination of the institutional allocation. In the two-year sector, the model has been more traditionally reliant on enrollment, but HECC intends to review and possibly revise the model in the coming months. Based on research and analysis of state funding formulas, NCHEMS has found that most states do not use a formula to fund public institutions; rather, they just roll over the prior year's "base" funding levels, adding or subtracting some amount either in a rough proportion to that base or according to specific institutional requests and appropriators' priorities. A well-designed formula offers a state a much more rational and strategic approach to allocating scarce resources than a base plus approach does, though the design and implementation of the formula needs to find an appropriate balance between recognizing institutional costs, incentivizing efficient operations, and aligning with state goals. Recent work NCHEMS has completed in Virginia offers a potentially useful path forward, with appropriate adaptations to meet the specifics of Oregon's context, especially as the state reviews the community college funding formula. This report describes the conceptual framework being used in Virginia's redesign of their funding model beginning on page 27, with the full diagram of the framework depicted in Figure 7.

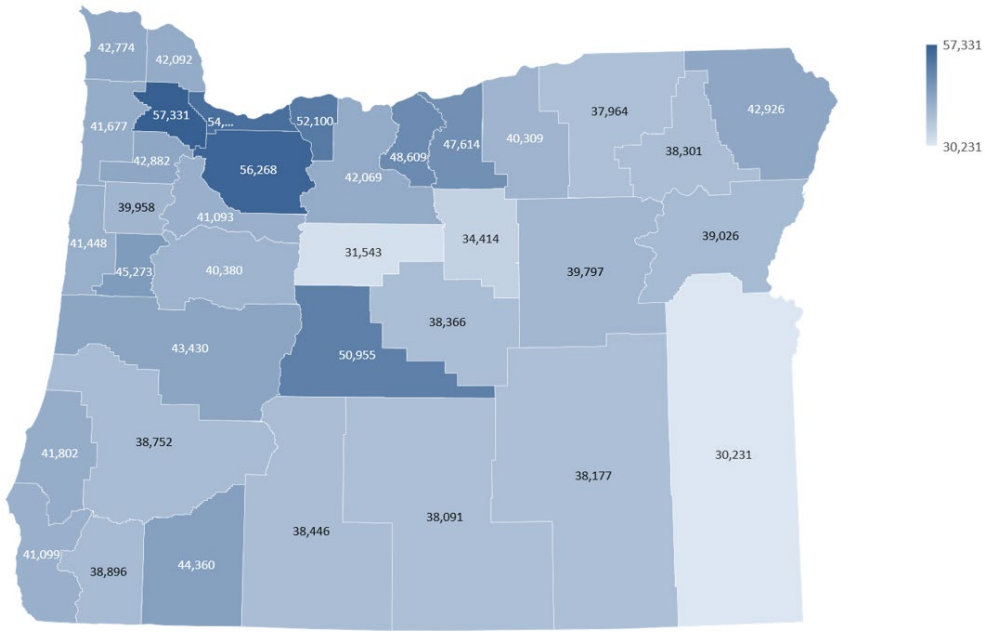
Oregon is a relatively poor state; its per capita income has lagged the national average for at least as far back as 2000 (Figure 42). The variation in income levels across the state is also substantial, with lower levels concentrated in the eastern part of the state and along the southern border, while the wealthiest counties (other than Deschutes) ring the Portland area (Figure 43). Similarly, with a few exceptions, poverty levels are highest in the east and south (Figure 44). But even some of the counties with relatively higher per capita income levels are places where a sizeable part of their population is living in poverty, including Lane, Jackson, and Benton counties—counties where three of the state's universities are located (plus Klamath County, which has a lower per capita income level). These indicators of wealth have implications for affordability—policymakers and other state actors may recognize that pricing decisions should reflect local conditions, especially for institutions that draw the majority of their students from surrounding counties. The contrast of high median incomes alongside high poverty rates in counties where state institutions are located raises questions about how the universities can serve as stewards of place—how can they mitigate this discrepancy, especially by ensuring local students are on a trajectory to a successful postsecondary pathway?

Figure 42. Oregon Per Capita Income as a Percent of the National Average



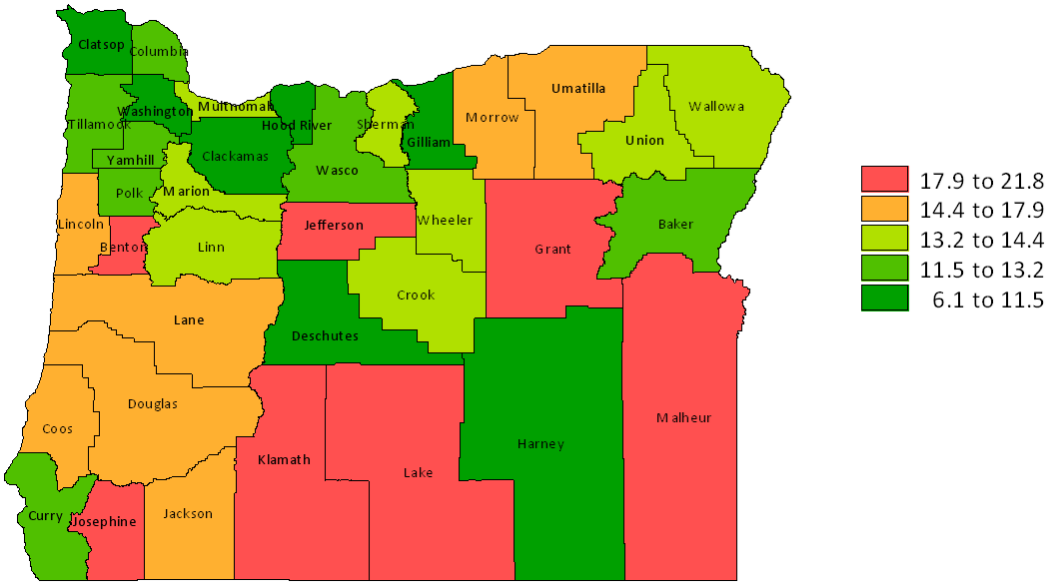
Source: Bureau of Economic Analysis.

Figure 43. Per Capita Income by Oregon County, 2017



Source: Bureau of Economic Analysis.

Figure 44. Average Annual Percent Living in Poverty, 2015-2019



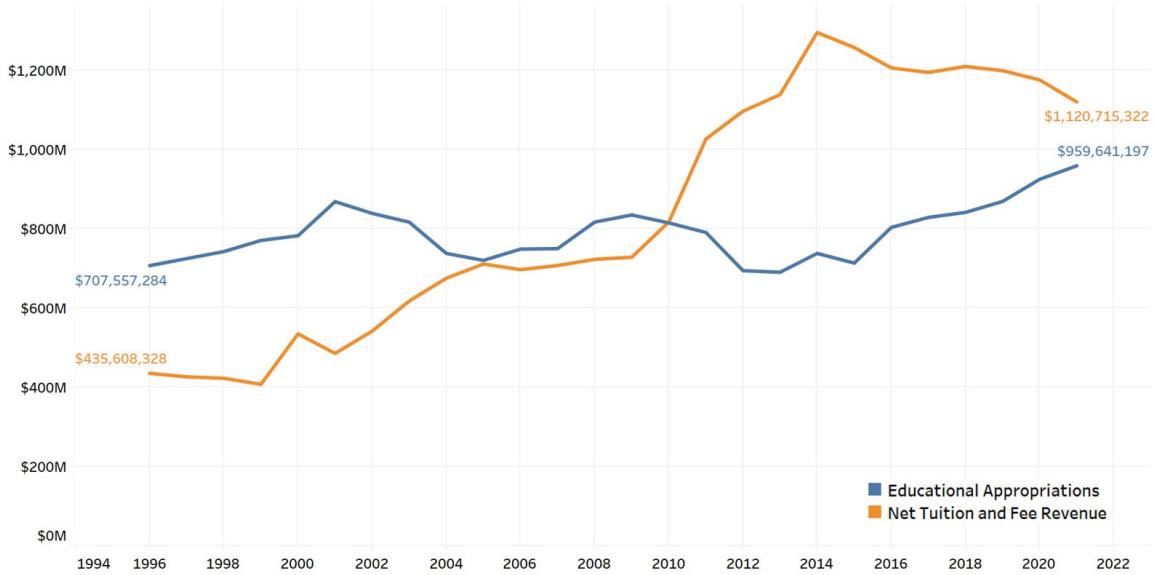
Source: U.S. Census Bureau, 2015-19 American Community Survey (ACS) 5-Year Public Use Microdata Sample (PUMS).

In comparison to other states, in FY 2021 Oregon's public institutions had more funding on a per student basis (at $18,477) than the nation's institutions as a whole did ($16,050) (Figure 45). State funding lagged the national average, however, and Oregon institutions more than made up the difference in tuition revenue. A very different picture emerges when looking at differences by sector: funding from the state to the universities was just two-thirds of the national average level, while Oregon's universities collected more than 50 percent more revenue from students than public institutions nationally did (Figure 46). Among community colleges, tuition revenue still outpaced the national by over $800 per student even though public funding from state and local sources for credit-bearing instruction also exceeded the national average by 22 percent.[16] Local funding accounts for roughly 30 percent of total educational revenue in Oregon, an amount similar to the nation as a whole, but a larger proportion than all but 12 states (and Alaska, but Alaska's unusual structure under which the two-year mission, apart from a single locally controlled institution, is almost fully enveloped within the four-year institutions in that state, which distorts this picture) (Figure 47).

Oregon has consistently expected students to bear more of the cost burden of public higher education than the nation as a whole, and a substantially larger share than its fellow Western states (Figures 48-51). The student share spiked in Oregon during the Great Recession but remained at over 50 percent overall in FY 2020. There is an argument for ensuring that tuition rates for in-state students are stabilized or reduced and the state backfill any lost revenues to the institutions.

[16] SHEF data for educational appropriations excludes funding and FTE enrollments for non-credit activity.

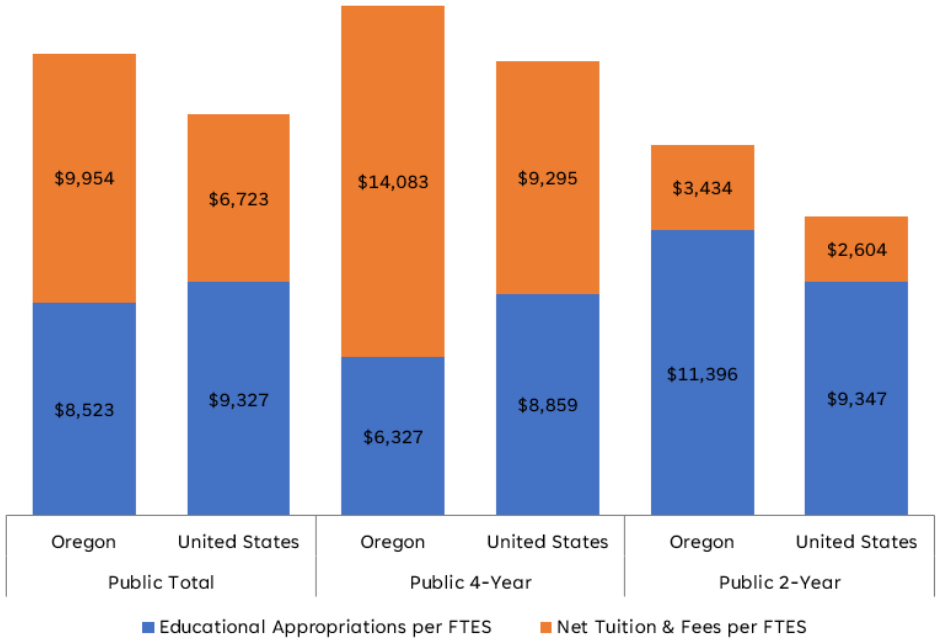
Figure 45. Educational Appropriations and Net Tuition Revenue for Oregon



Note: Educational appropriations and FTE exclude non-credit enrollments, but do include state financial aid, including aid awarded to students attending Oregon private, non-profit institutions. Data are adjusted for inflation using HECA.

Source: SHEEO SHEF.

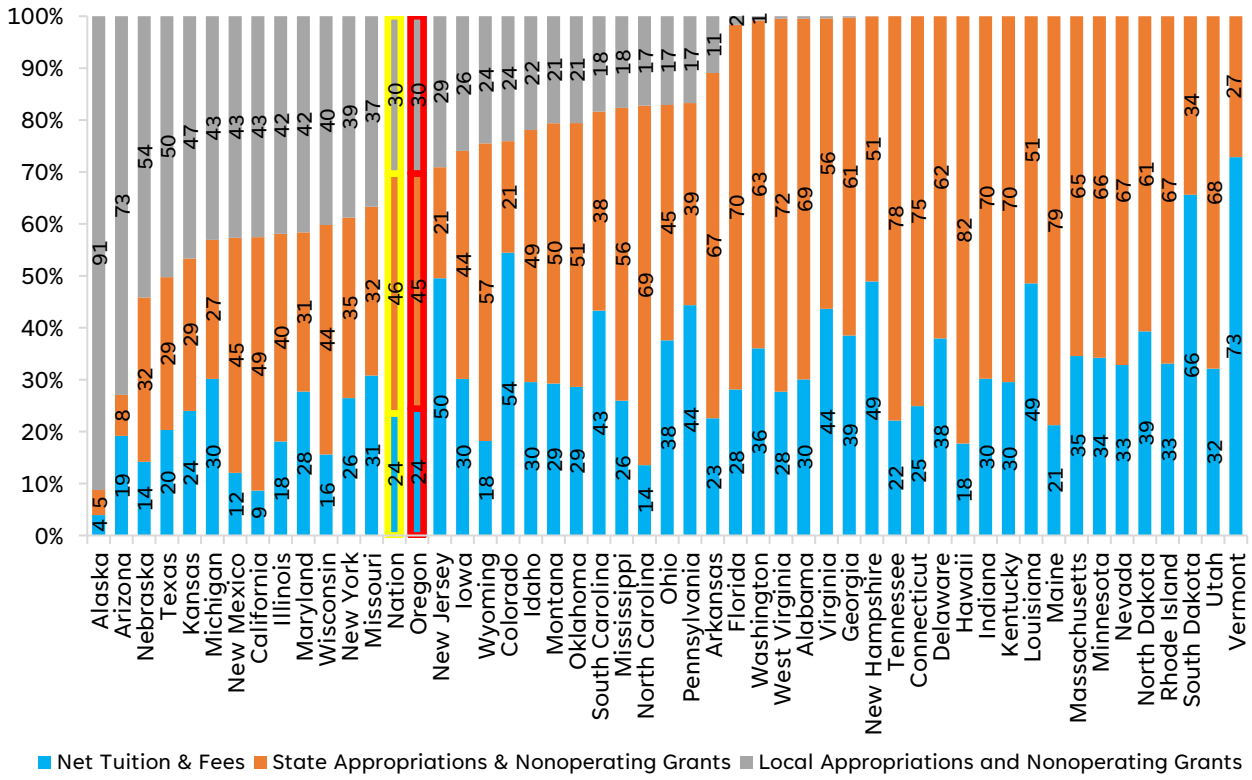
Figure 46. Educational Appropriations and Net Tuition Revenue by Sector, FY 2021



Note: Educational appropriations and FTE exclude non-credit enrollments.

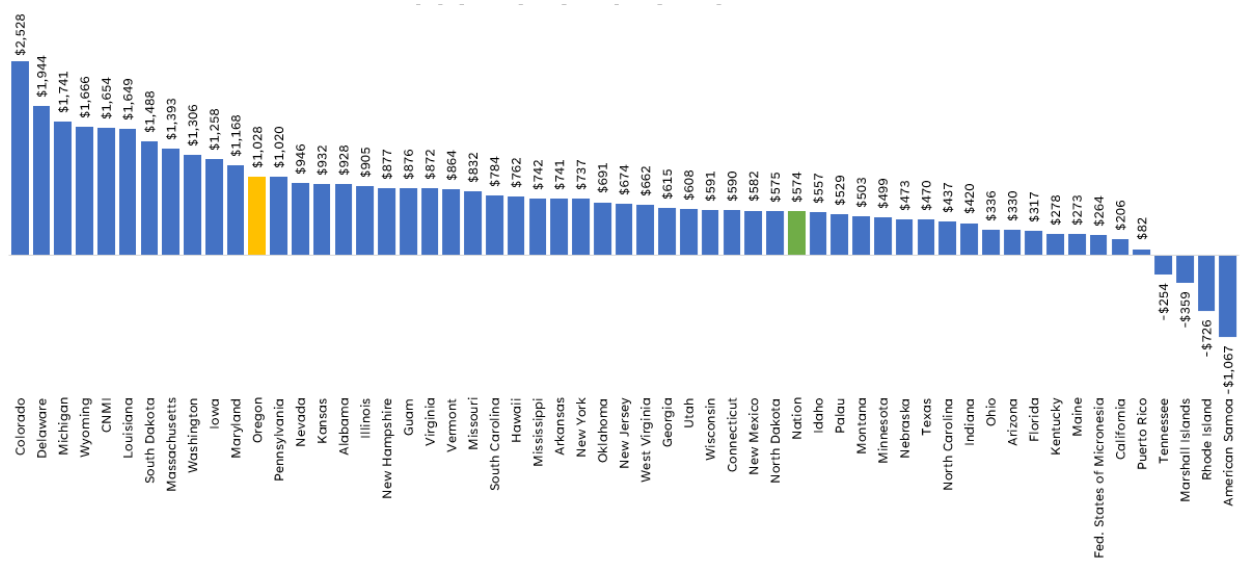
Source: SHEEO SHEF.

Figure 47. Public Two-Year Institutions Percent of Total Funding by Revenue Source, FY2020



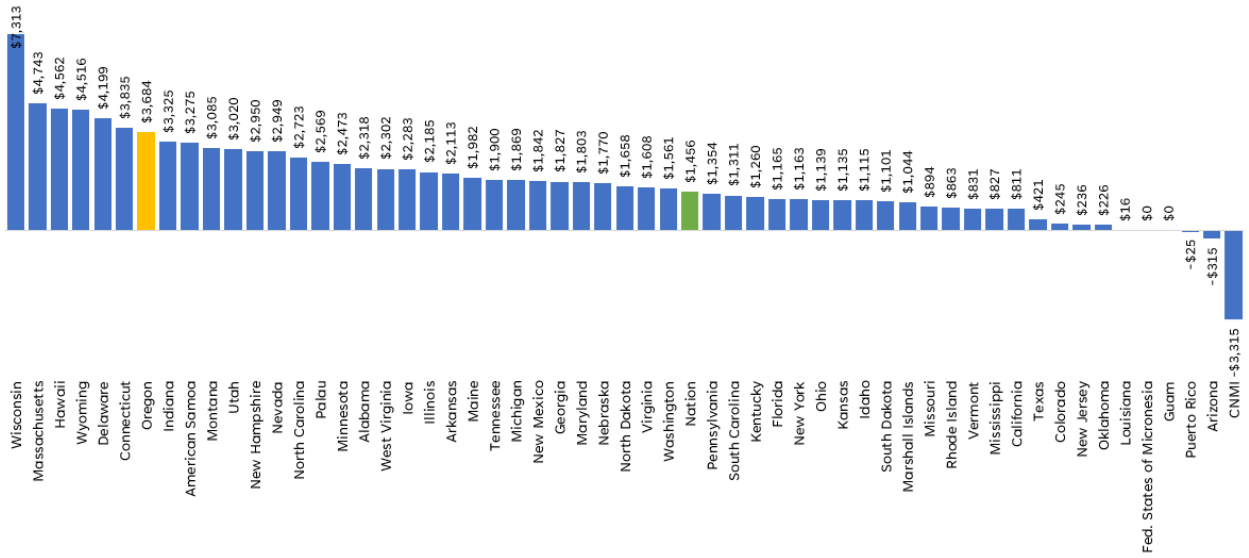
Source: NCES IPEDS.

Figure 48. Change in Net Tuition Revenue per FTE, Public Two-Year Institutions, FY2010 to FY2020



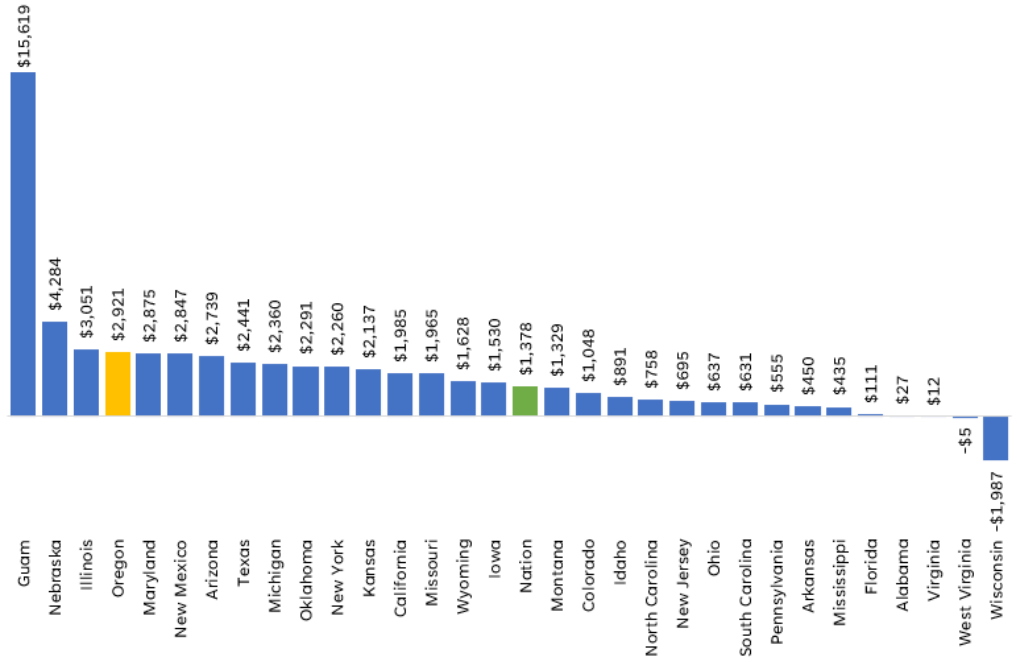
Source: NCES IPEDS

Figure 49. Change in State Appropriations per FTE, Public Two-Year Institutions, FY2010 to FY2020



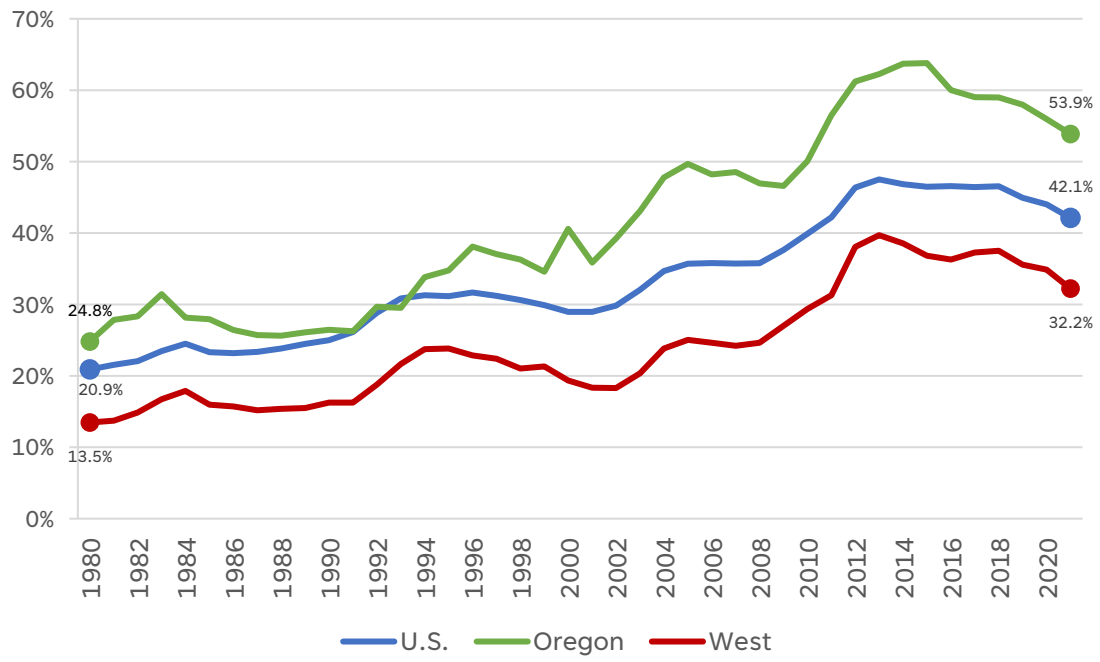
Source: NCES IPEDS

Figure 50. Change in Local Appropriations per FTE, Public Two-Year Institutions, FY2010 to FY2020



Source: NCES IPEDS

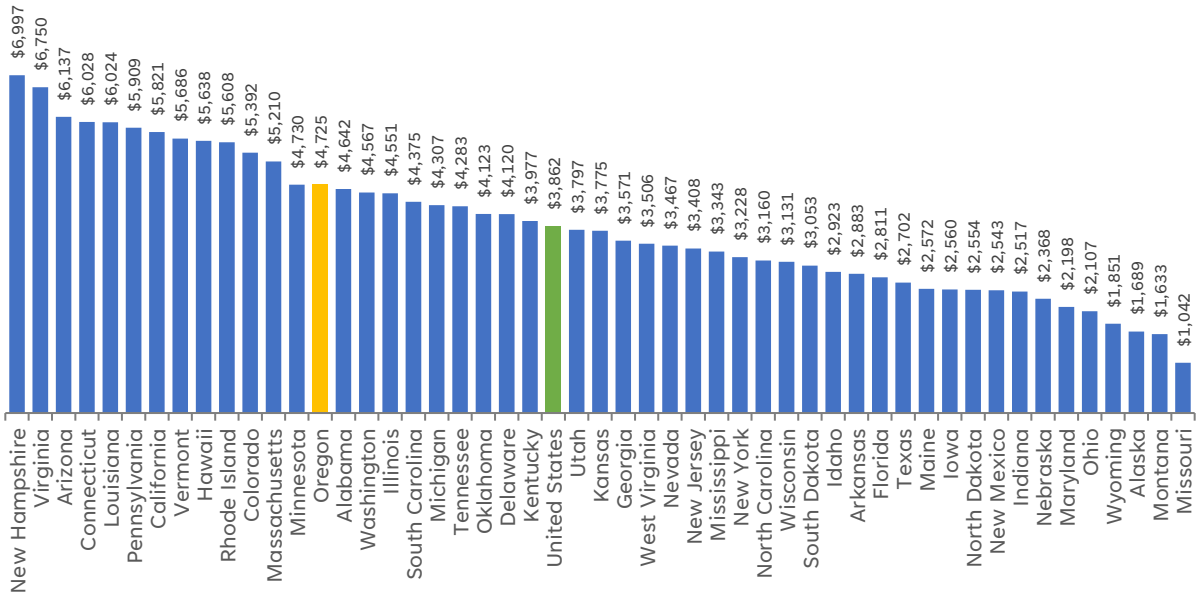
Figure 51. Net Tuition Revenue as a Percent of Total Educational Revenue, 1980-2021



Source: SHEEO SHEF.

Published tuition prices across all sectors outpaced growth nationally and in the West, even though Oregon's prices generally started out higher than other states' (Figures 52-54). In 2008, published prices at Oregon's public research universities were roughly equivalent to the average nationally. But between then and 2018, they by $4,725 (after adjusting for inflation), well above the national average growth. Increases in published tuition prices in the public comprehensive sector and the public two-year sector also substantially outpaced the national average, but in both of those sectors the prices in 2008 started out significantly higher than the corresponding national averages.

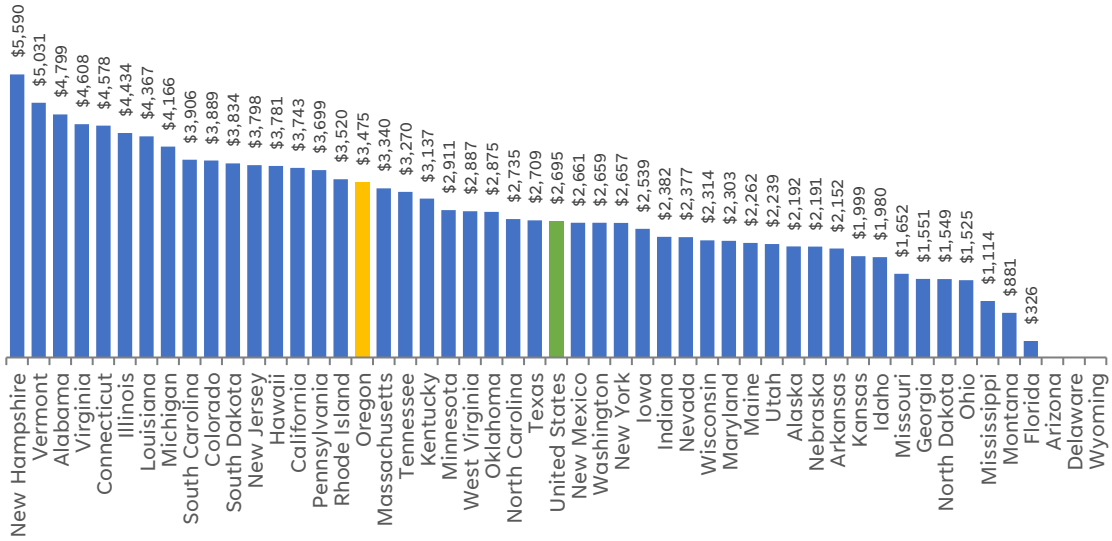
Figure 52. Change in Published In-State Tuition and Fees at Public Research Universities, 2008-2018



Note: Data are adjusted for inflation and are the enrollment-weighted average facing first-time full-time undergraduate students.

Source: NCES IPEDS.

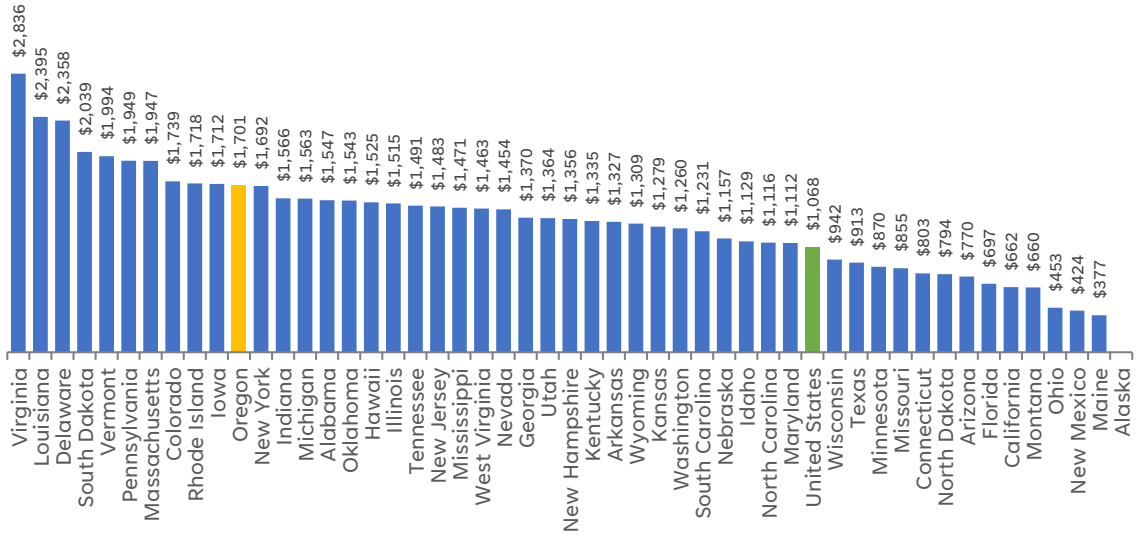
Figure 53. Change in Published In-State Tuition and Fees at Public Comprehensive Universities, 2008-2018



Note: Data are adjusted for inflation and are the enrollment-weighted average facing first-time full-time undergraduate students.

Source: NCES IPEDS.

Figure 54. Change in Published In-District Tuition and Fees at Public Two-Year Institutions, 2008-2018

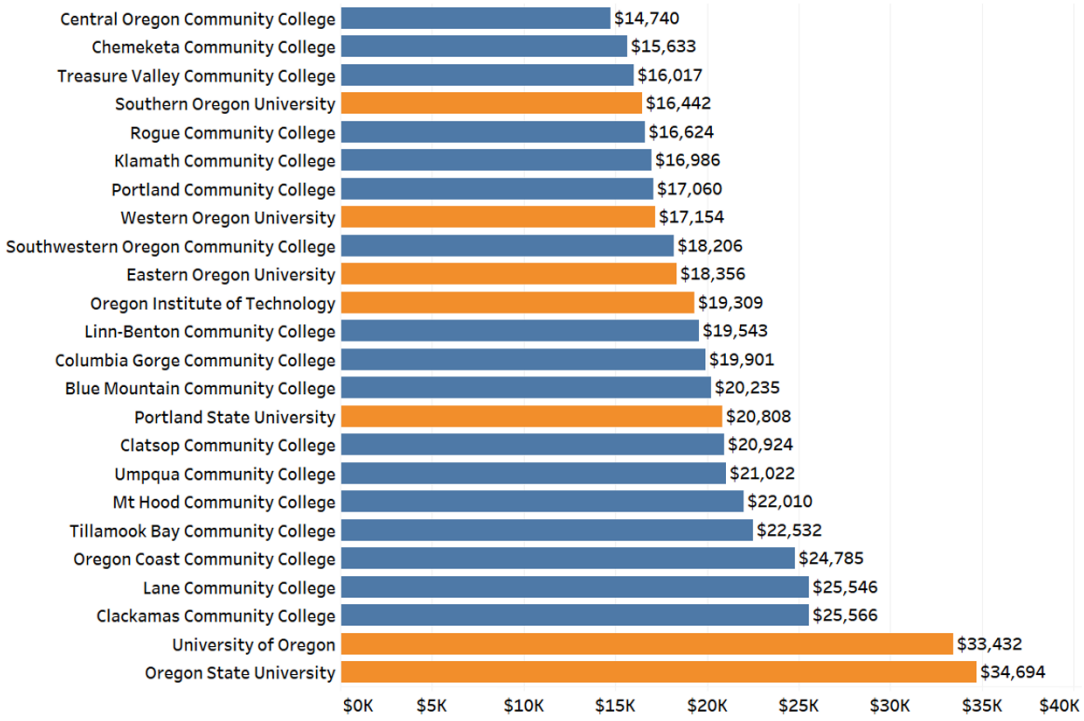


Note: Data are adjusted for inflation and are the enrollment-weighted average facing first-time full-time undergraduate students.

Source: NCES IPEDS.

Education and general expenditures per FTE vary among Oregon institutions, and are significantly higher at the University of Oregon and Oregon State than they are at the state's other four-year and two-year institutions (Figure 55). These additional expenditures reflect their broader mission to conduct research, run extension and other public service activities, and serve a statewide, national, and international audience.

Figure 55. Education and General Expenditures per FTE, FY2020

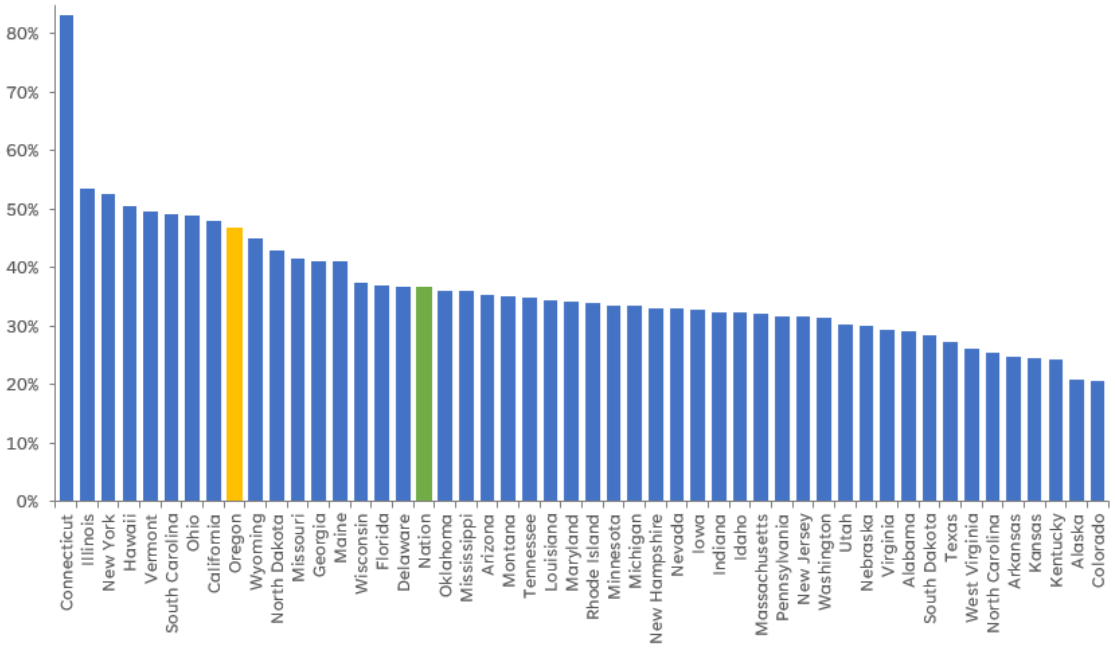


Note: Education and general expenditures include expenditures on instruction, research, public service, academic support, student services, and institutional support.

Source: NCES IPEDS

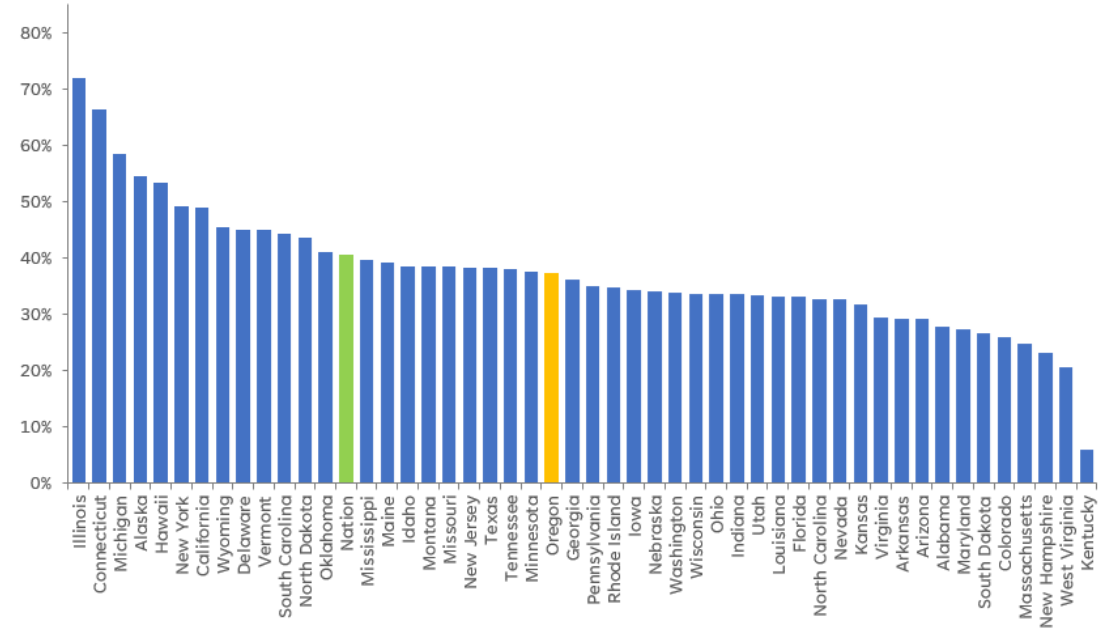
Oregon's four-year institutions spend more on employee benefits, as a percentage of salaries, than do other states and the nation overall (Figure 56). In an industry so reliant on personnel, employee compensation represents the large majority of the costs of the enterprise as a whole; these—particularly benefits costs—are not costs that are within institutions' control. Yet these costs go a long way in determining affordability, and they also impose limits on staffing to serve students most effectively. The state's two-year institutions, by contrast, spend less than the national average on benefits as a percentage of salaries (Figure 57). Although the difference is not substantial in this sector, these data deserve scrutiny, particularly if these institutions are turning to faculty and staff who are ineligible for benefits as a way to control costs, potentially at the expense of educational quality.

Figure 56. Expenditures on Benefits as a Percent of Expenditures on Salaries and Wages, Public Four-Year Institutions, FY2020



Source: NCES IPEDS

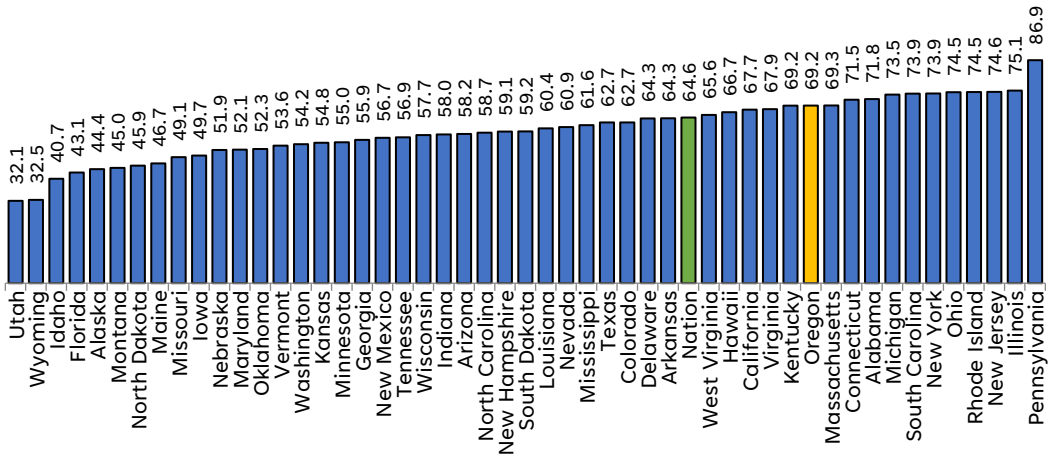
Figure 57. Expenditures on Benefits as a Percent of Expenditures on Salaries and Wages, Public Two-Year Institutions, FY2020



Note: New Mexico is not displayed because seven of 20 institutions reported negative benefits.
Source: NCES IPEDS

With Oregon's dependence on tuition revenue to fund operational costs, it is critical to keep track of affordability metrics that provide information about the actual out-of-pocket expenses students face in attending college (Figures 58-61). These are important to review for different income levels, in particular. Not surprisingly given the preceding data, net prices for Oregon institutions —the amount of money resident students are expected to pay to cover full-time cost of attendance after all grant aid is accounted for—are high, relative to other states.[17]

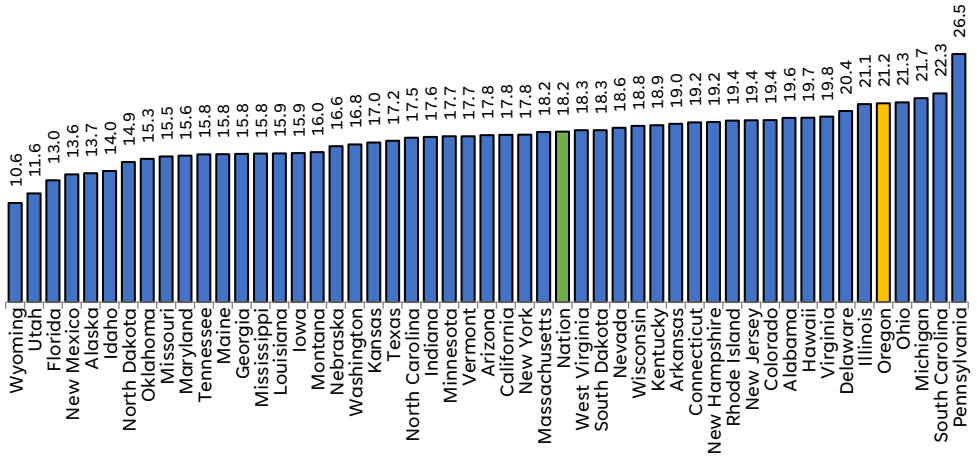
Figure 58. Net Price as a Percent of Lowest Quintile Family Income, Public Four-Year Institutions, FY 2018



Note: Data are for first-time, full-time undergraduates who received Title IV aid and enrolled in the fall.
Source: NCES IPEDS.

[17] State comparisons of net prices in the two-year sector are not provided since the data apply for first-time, full-time students only. These students represent only a minority of entering students at community colleges, rendering the analyses less useful.

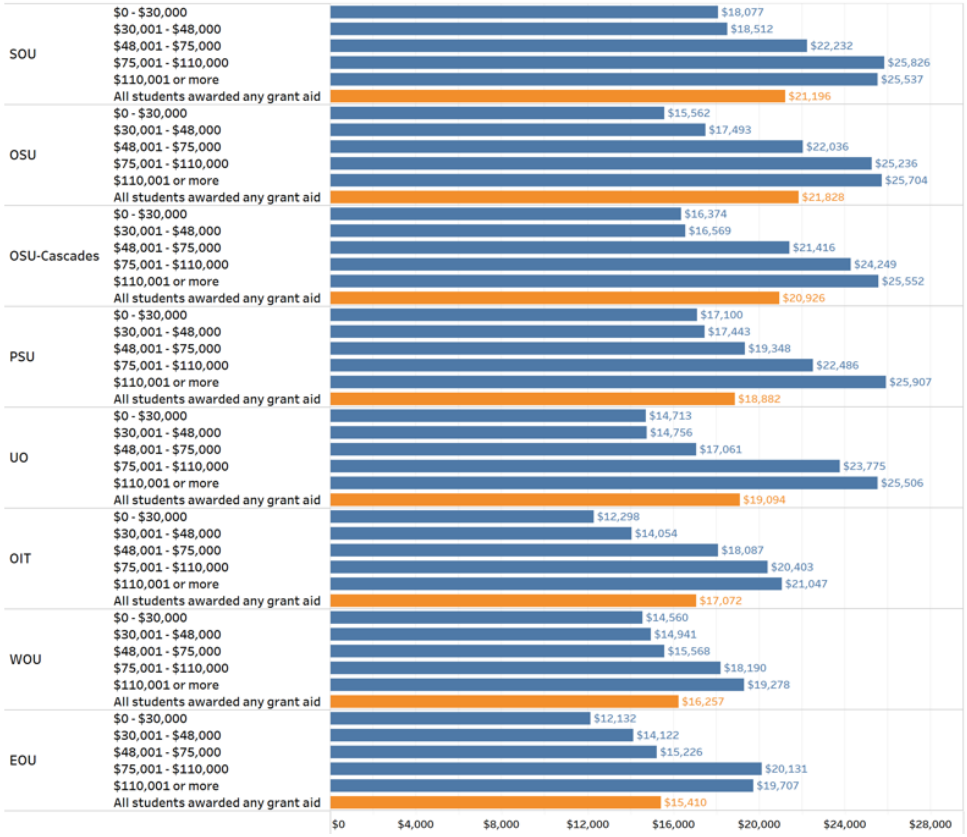
Figure 59. Net Price as a Percent of Median Family Income, Public Four-Year Institutions, FY 2018



Note: Data are for first-time, full-time undergraduates who received Title IV aid and enrolled in the fall.
Source: NCES IPEDS.

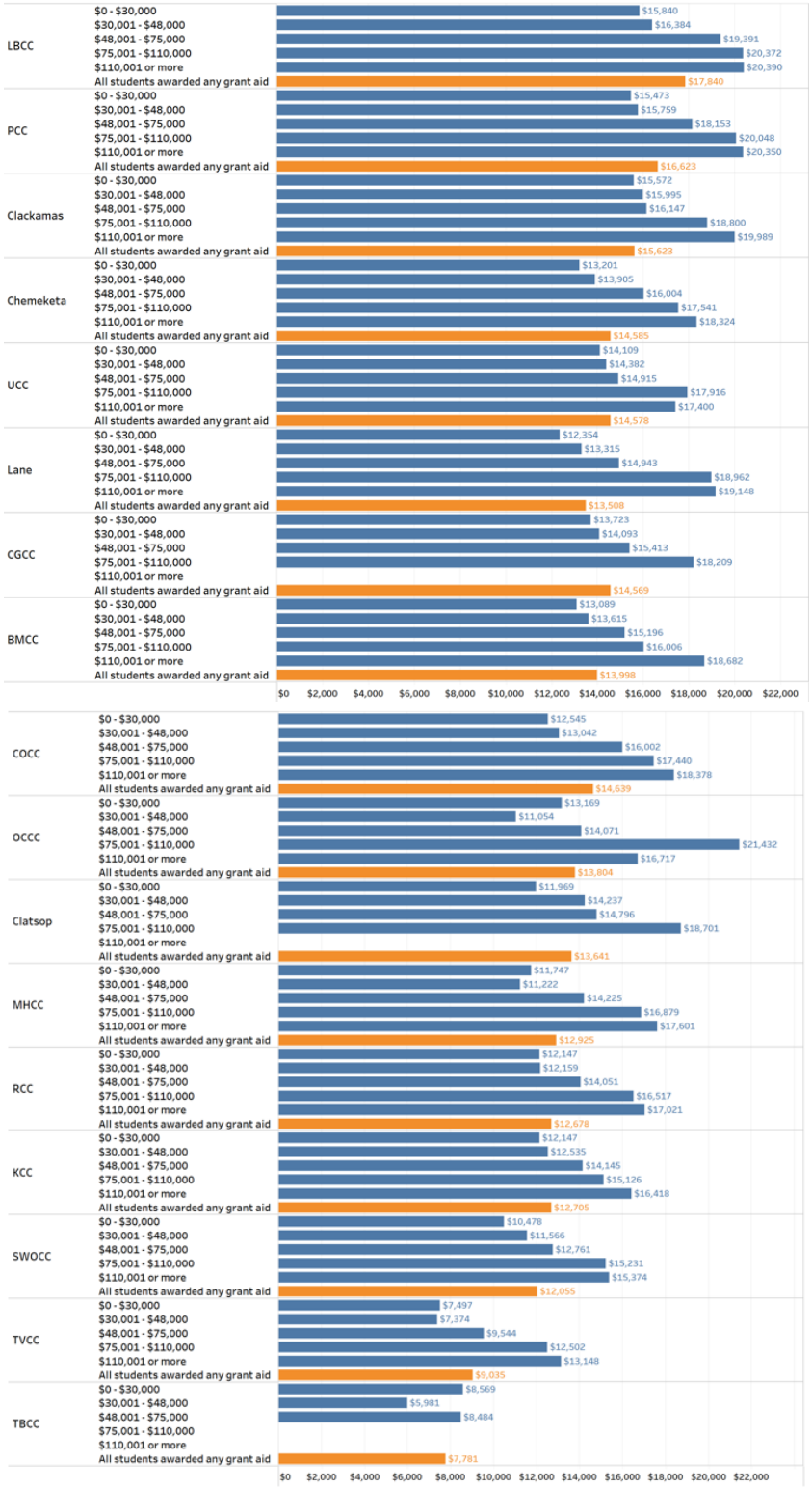
Net prices are generally higher for students from higher income brackets. However, at a number of Oregon institutions, costs for students from the lowest income bracket ($30,000), after grants and scholarships, still exceed half of their families' annual incomes.

Figure 60. Net Price by Income Level, Oregon Universities, FY 2020



Note: Data are for first-time, full-time undergraduates who received Title IV aid and enrolled in the fall.
Source: NCES IPEDS.

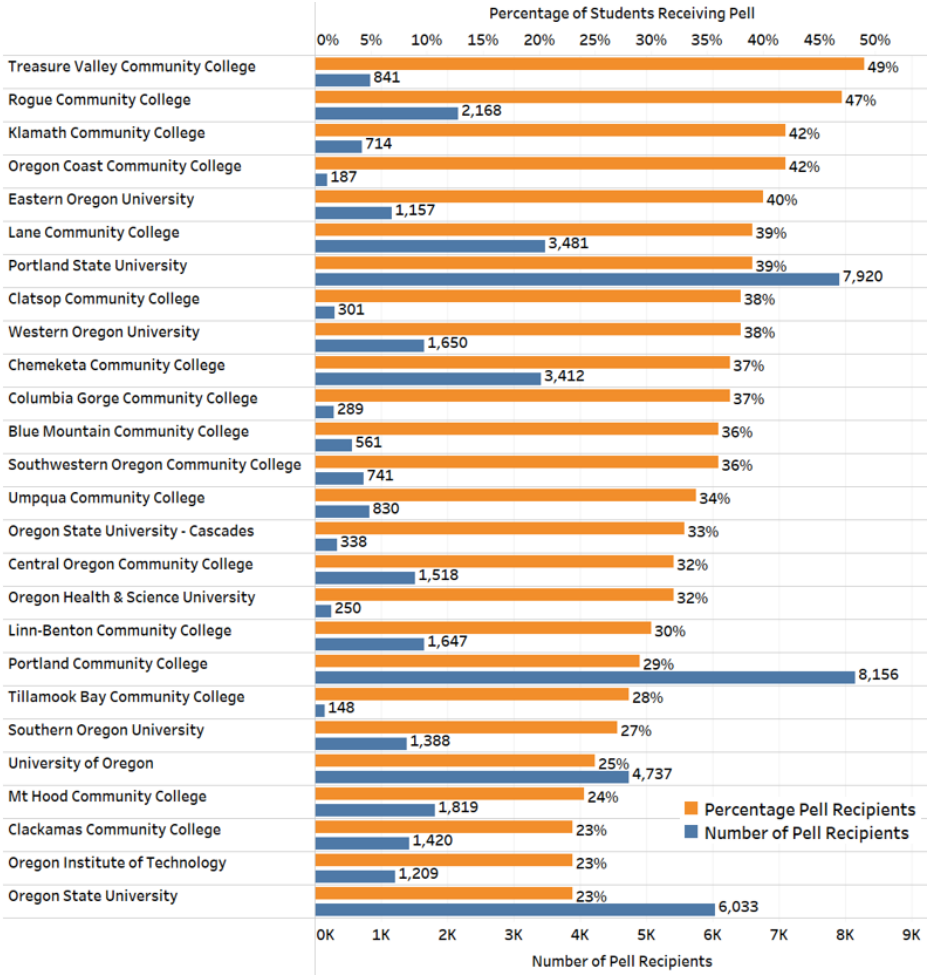
Figure 61. Net Price by Income Level, Oregon Community Colleges, FY 2020



Note: Data are for first-time, full-time undergraduates who received Title IV aid and enrolled in the fall.
Source: NCES IPEDS.

Unsurprisingly, Oregon's largest institutions also serve the largest number of Pell grant recipients, though Pell recipients do not always make up a large percentage of their overall student bodies (Figure 62). Oregon State serves the third largest number of Pell recipients, but only 23 percent of its students receive Pell, the smallest percentage of all the state's colleges and universities. Portland-area institutions serve large numbers of Pell students; the two largest groups of Pell recipients attend Portland Community College and Portland State, respectively. There is not a clear pattern of which type of institution is more likely to serve Pell students; both universities and community colleges vary in their percentages of these low-income students.

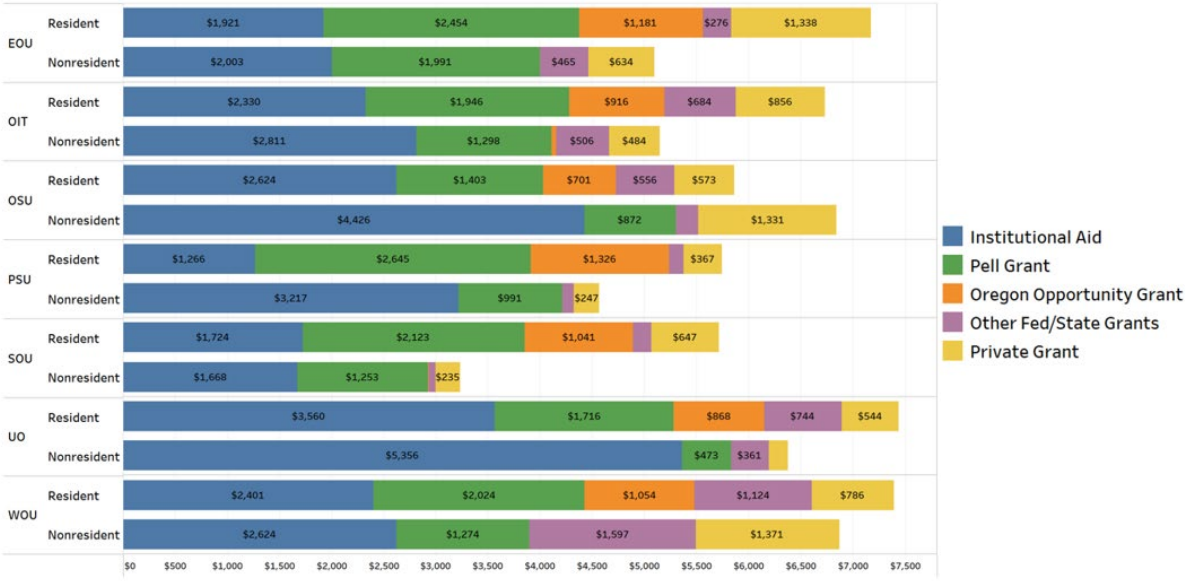
Figure 62. Number and Percent of Undergraduates Receiving Pell Grants, 2019-20



Source: NCES IPEDS.

Given these patterns of funding, Oregon universities have sought to tap the nonresident market for students who can pay a premium to attend. Among the most powerful tools to use for this purpose is institutional aid, and most Oregon universities devote more of their own aid to non-residents than to resident students on a per student basis (Figure 63). With fewer non-residents enrolled at each of the institutions, however, all but UO spent more of their own money on resident students (Figure 64).

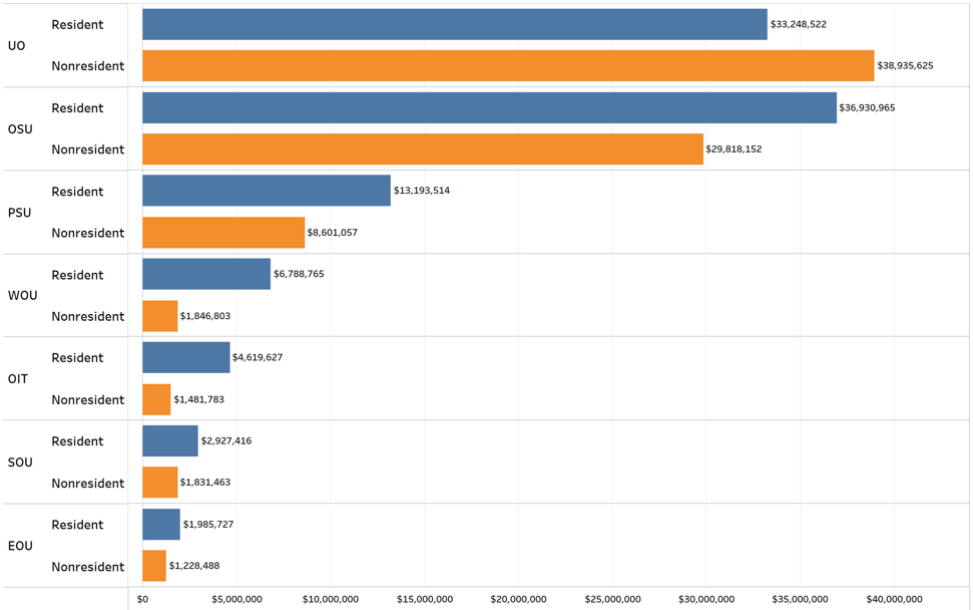
Figure 63. Grant Aid per Student by Source and Residency, FY 2021



Notes: Data are annual for full-time first-time students enrolled in Fall 2020. Some data are suppressed to avoid violated state-mandated cell-size limitations.

Source: HECC

Figure 64. Institutional Grant Aid Funding by Residency, FY 2021



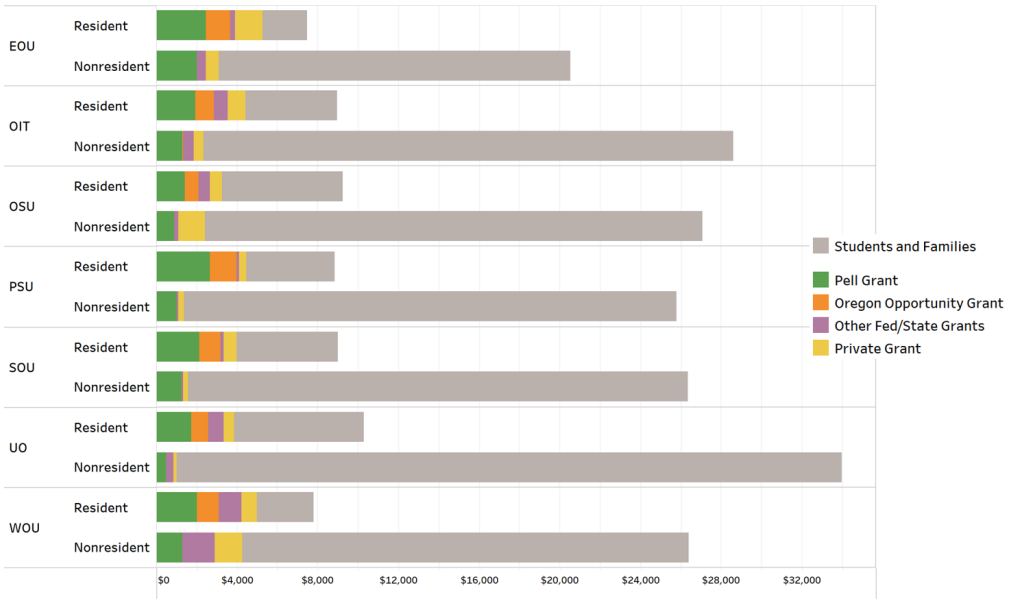
Notes: Data are annual for full-time first-time students enrolled in Fall 2020. Some data are suppressed to avoid violated state-mandated cell-size limitations.

Source: HECC

A picture of how crucial the enrollment of non-resident students is to Oregon's universities' bottom lines shows large premiums in terms of additional revenue collected from each non-resident enrolled relative to the revenue collected for each resident student (Figures 65-68).

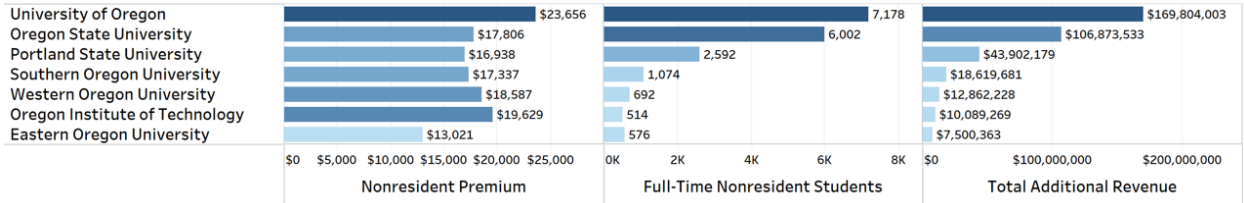
Each of Oregon's four-year institutions collected substantially more revenue for nonresidents than residents, even after excluding institutional grant aid expenditures. For example, in the University of Oregon's case, even though it maintains the largest budget for providing aid to nonresident students, the revenue it collects from nonresidents is about three times what it collects from resident students, on average. Overall, that additional funding amounted to nearly $170 million at UO, and $7.5 million at EOU, representing funding that plays a crucial role in supporting the institutional mission. Finally, these data make it evident that the use of institutional aid funding to attract non-residents has a substantial return on investment for the institutions. But they also may be paying off for the state taxpayers in helping to support resident students' enrollment, including those from low-income and underrepresented racial/ethnic backgrounds, and in providing crucial dollars that help offset the institution the below-average state funding levels already documented.

Figure 65. Tuition and Fees Revenue per Full-Time Student by Source, FY 2021



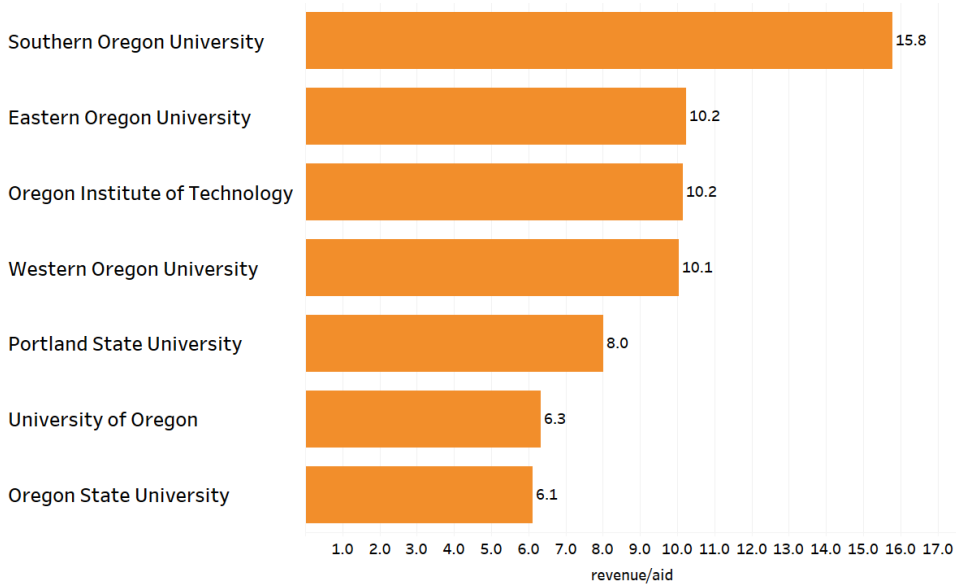
Notes: Data are annual for full-time first-time students enrolled in Fall 2020. Some data are suppressed to avoid violated state-mandated cell-size limitations. Data exclude institutional aid and revenue from student payments other than those made for tuition and fees.
Source: HECC.

Figure 66. Additional Tuition Revenue Collected from Non-Resident Students, FY 2021



Notes: Data are annual for full-time first-time students enrolled in Fall 2020. Some data are suppressed to avoid violated state-mandated cell-size limitations. These data provide the amount of additional revenue nonresidents contribute than they would have had they been resident students. The "nonresident premium" is the additional revenue generated from each nonresident student.
Source: HECC

Figure 67. Revenue Collected from Nonresident Undergraduates per Dollar Awarded in Institutional Aid, 2020-2021



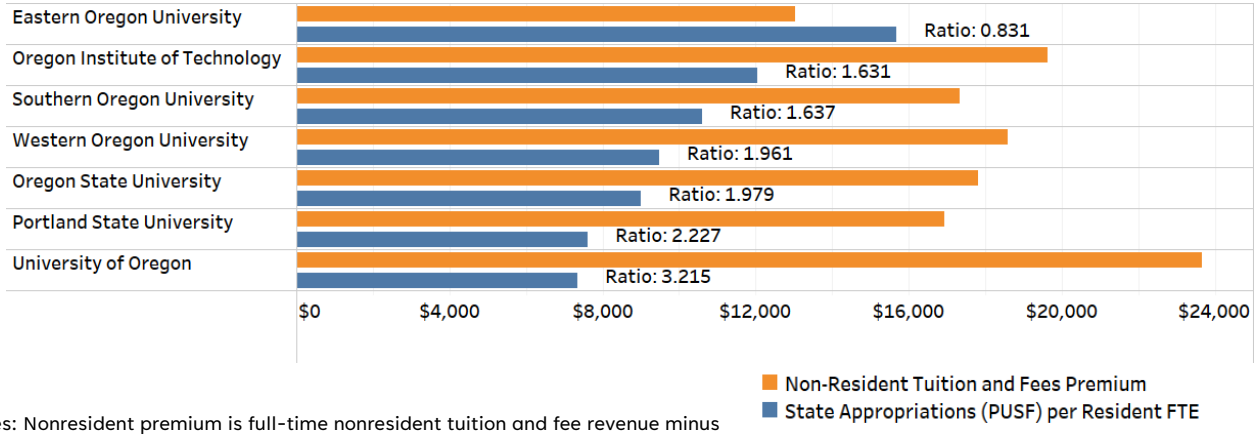
Notes: Data are tuition and fees revenue collected from nonresident undergraduates minus institutional aid dollars awarded to nonresident undergraduates and are annual for full-time students enrolled in Fall 2020. Some data are suppressed to avoid violated state-mandated cell-size limitations.
Sources: HECC and NCES IPEDS

A caution is warranted, however, in that the ability to successfully recruit non-residents is very uneven among the institutions—unevenness that is likely to grow more apparent with demographic changes ahead. These factors may be exacerbated by decisions made by the University of California to enroll many more Californians, the population targeted by Oregon institutions. Finally, these data only reflect one of the ways that recruiting (and retaining) non-residents may be costlier than recruiting Oregonians—there are sure to be significant investments in personnel and other expenses related to such efforts that NCHEMS does not include in this analysis. These, plus the associated attention given to such recruitment efforts, may distract from the principal goal of serving Oregonians if not monitored carefully. Oregon is not at all unique in this practice, as it has increasingly become a national trend for those institutions capable of attracting out-of-state students in the past. Moreover, Oregon benefits substantially when students from elsewhere are educated in its public institutions *and subsequently remain after graduation to contribute to Oregon's workforce needs.* And there is some early evidence suggesting that non-residents may be especially prone to enrolling in programs that are workforce relevant (see Virginia cost study report at www.schev.edu/coststudy).

From the institutional perspective, nonresident students play a critical role in supporting the operating budget, yet the degree to which each nonresident student brings in more funding compared to each resident student varies significantly. Though nonresident students generate more tuition and fee revenue than resident students, only resident students are counted in the state's funding model used to allocate Public University Support Funds (PUSF). At Eastern

Oregon University, the PUSF allocation per FTE exceeds the nonresident tuition and fee premium, or the additional tuition and fee payments collected from a nonresident relative to what an institution would have been able to collect from a resident student, after accounting for institutional aid. But this presumes that additional resident students are available and can be recruited to EOU. All other universities in the state collected significantly more revenue from each nonresident than they would have received in PUSF if that student had been from Oregon. These variations among institutions are caused by differences in tuition rates and in how institutions award aid dollars, as well as the way in which the PUSF funding model rewards mission differentiation and degrees to resident sub-group populations. It is critical to recognize that the additional dollars collected from nonresidents can be put to many uses, including by paying for the recruitment of those out-of-state students so that in-state resources are not used, helping support Oregon residents through targeted institutional aid or by relieving upward pressure on resident tuition prices, funding the development of new or expanded programmatic capacity in areas of state need, as well as other institutional priorities.[18]

Figure 68. Revenue from Nonresident Students vs. State Appropriations for Resident Students, FY 2021



Notes: Nonresident premium is full-time nonresident tuition and fee revenue minus resident tuition and fee revenue. Revenue excludes institutional aid. PUSF per FTE is based on FY21 allocations and 2020 Fall FTE.
Sources: HECC; IPEDS.

3. How might Oregon's higher education institutions best learn, collaborate, and advance a collective commitment to advance racial justice, equity, and inclusion on our campuses, in our communities and across our state?

In several important ways, Oregon institutions and the state as a whole have taken a leading role in exemplifying a commitment to social and racial equity, and in taking clear steps to better realize those ideals. Among the efforts in this vein are a clear and consistent expression of the need to address equity gaps in educational opportunity in strategic planning documents and in public expressions of state and institutional leaders, along with specific, practical

[18] Neither the enrollment of nonresidents (with exceptions for those situated along state borders) nor large institutional aid budgets characterize the experiences of community colleges, which explains their absence in this analysis.

initiatives to provide free college to members of tribal communities. This rhetoric is exemplified in Oregon's Equity Lens, a clear statement of values and aspirations for a just and equitable society that is designed to underlay decisions and motivate action.

And action has been taken. Portland State, for example, has initiated set of initiatives within its *Time to Act* plan for racial justice. The plan includes an equity scorecard with empirical metrics intended to show impact of the package of initiatives. The colleges on the eastern side of the state—Eastern Oregon, Blue Mountain, and Treasure Valley—are working together on a variety of fronts to address equity issues. The same is true of other institutions as well: it is evident that institutions are committed to working to achieve equity goals.

Yet there is more to be done. A good example of ways postsecondary institutions can collaborate can be found in the work of the Foundation for Student Success. This Foundation identified as set of institutions that had proven successful in reducing equity gaps and paired them with a set of other institutions committed to making such improvements—essentially creating a set of learning communities focused on reducing equity gaps. Case studies of these communities and other information are available on their website (https://fssawards.org/). A similar approach could be taken by groups of Oregon institutions working together to learn from institutions that have had success in some facet of improving campus equity. For example:

- Several institutions have invoked some variation of the National Football League's "Rooney Rule"—requiring the short list in all searches to include at least one individual from an underrepresented population. In fact, Oregon enacted a form of this requirement for hiring some positions within institutional athletic departments in 2019. Thus, a broader application of a similar rule to all aspects of the institution is supported by precedent in Oregon. Some institutions have been more successful than others in accomplishing this for occupations in which such candidates are difficult to attract. How did they do it?
- Some institutions have taken seriously the search for course materials that are culturally diverse. What materials have they identified and what processes did they use to identify them?
- Adopt predictive analytics, but in ways that do not bake in historic patterns of performance. Perhaps the best example of employing predictive analytics to remove equity gaps can be found in the work done at Georgia State University. (https://success.gsu.edu/approach/)
- Work together to share strategies for retention of minority employees.
- Do the detailed data and outreach work to make sure that all understand the different nature and needs of BIPOC communities in the different regions of the state.

As the debate over affirmative action unfolds with new cases before the U.S. Supreme Court, Oregon's institutions can collectively issue statements of support for the educational value and importance of diversity in classrooms, laboratories, and co-curricular experiences, drawing particularly on relevant research that demonstrates its links to educational outcomes, innovation and economic opportunity, improved societal conditions and civic behaviors. They

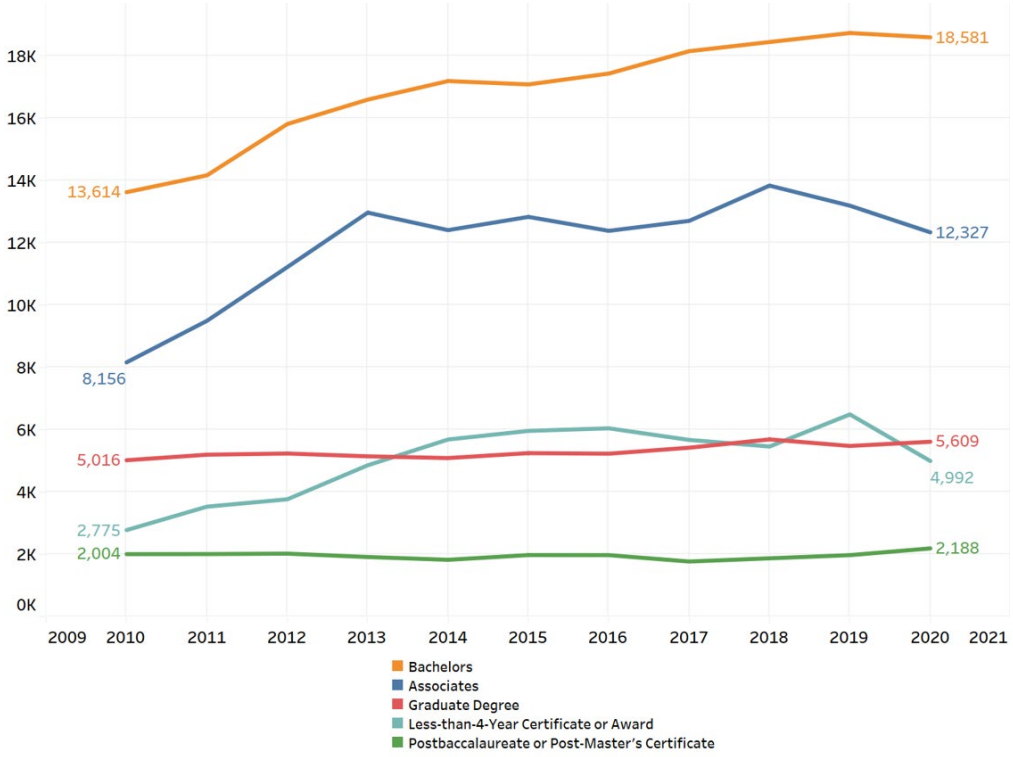
can also anticipate and plan for ways that preserve and enhance diverse representation on campus in the event that new policies and procedures are required in the wake of any judgments to come. Such plans should be consistent with any expressions related to audience that are a part of assignments of role and mission for individual institutions; for instance, some institutions may adapt policies that are enacted in other states to help promote diversity via an automatic admissions policy such as Texas's Ten Percent policy. All of the above suggestions require a forum in which these topics can be discussed, and good ideas shared. A role for HECC is to provide such a forum and provide staff work to gather information that will make these discussions more fruitful.

4. **Where might strategic investments be made in the teaching and research infrastructure and general operations of Oregon's higher education institutions to advance the higher education goals of the state, the missions of respective institutions, and contribute to economic development and social mobility in the state?**

Despite a mixed enrollment picture among Oregon's four-year institutions, the number of bachelor's degrees awarded over time has consistently grown over the past 10 years, and the number of graduate degrees and postbaccalaureate and post-Master's certificates have all remained essentially flat (Figure 69). Associate degrees and certificates, however, have not experienced the same growth, and particularly decreased during the COVID-19 pandemic.

These findings suggest the need for rethinking the approach to serving community college students, particularly the large number of students who attend college part-time. The pandemic created a situation that forced all instruction to be remote. Many students struggled with learning in this manner—but they also discovered that such learning allowed them to better manage the requirements of education with the other demands on their time. There is a statewide need for opportunities for faculty to learn how to better deliver courses using "flex" modalities tailored to the circumstances of individual students (and to do so in ways that do not destroy their own quality of life). Carried to the logical conclusion this need for tailoring delivery to the needs of each student leads to competency-based education as the wave of the future. This will require a complete overhaul of the approach to instruction, an approach that requires not just faculty development, but also development of a cadre of learning coaches and instructional design experts.

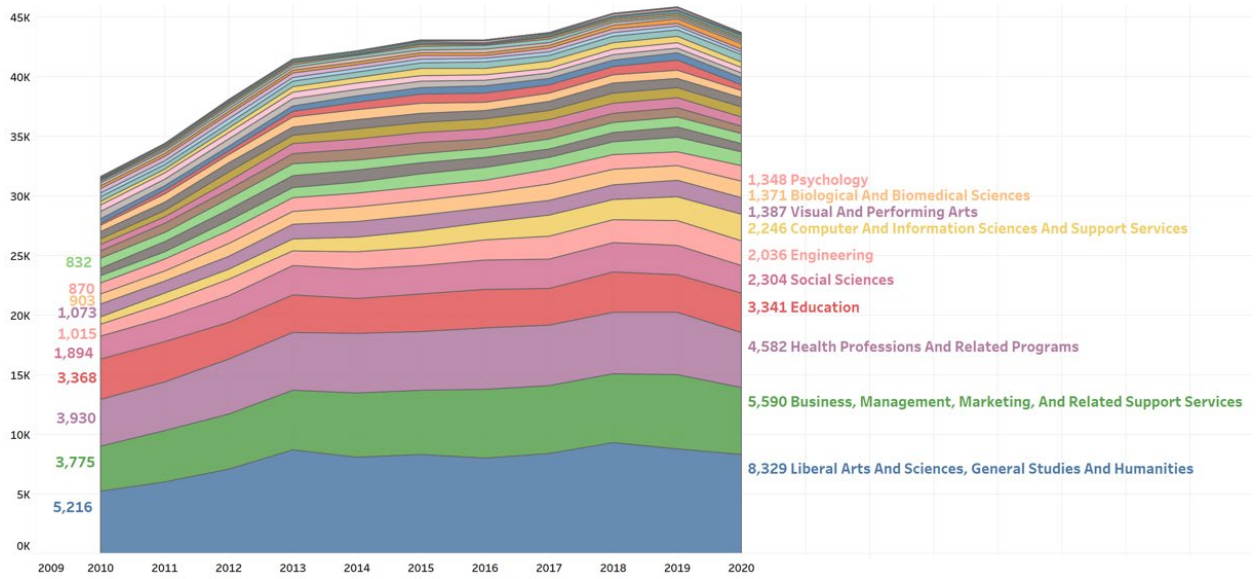
Figure 69. Credentials by Level Conferred by Oregon Public Colleges and Universities, 2010-2020



Source: NCES IPEDS.

Combining all degree levels, the most frequently awarded degrees and certificates over time have been in liberal arts, business, and health professions (Figure 70). Engineering and Computer and Information Sciences, the 6th and 7th most popular fields of study in terms of credentials awarded, have both grown substantially since 2010.

Figure 70. Credentials by Field of Study Conferred by Oregon Public Colleges and Universities, 2010-2020

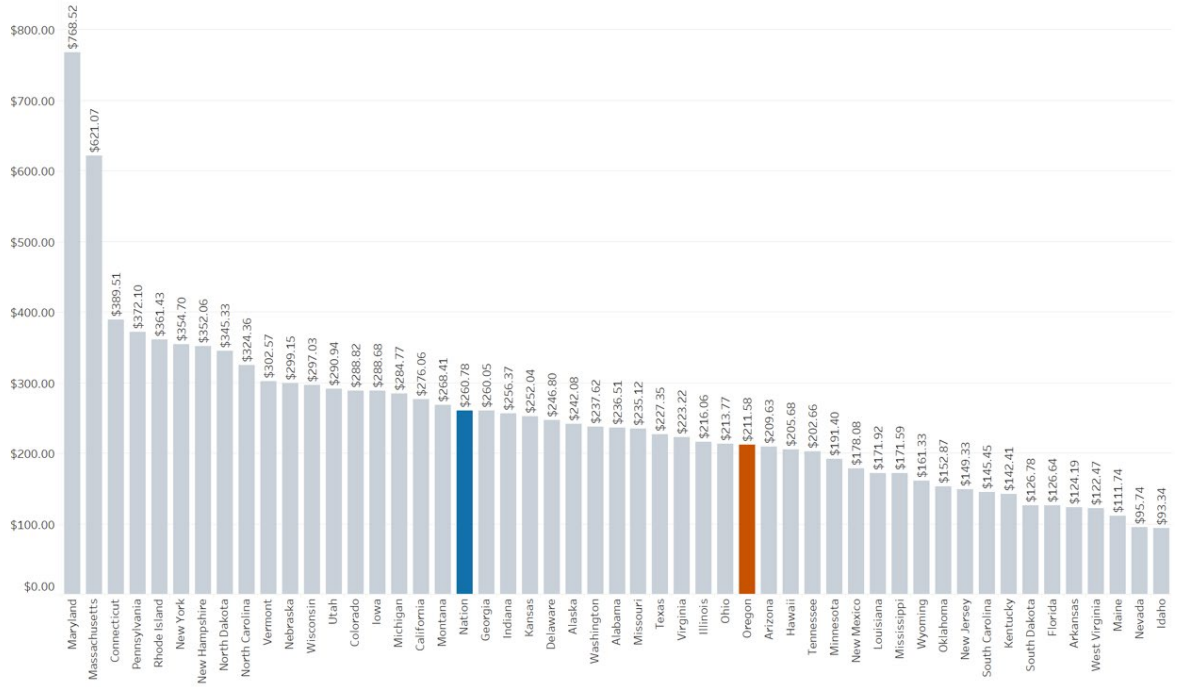


Source: NCES IPEDS.

In addition, more investment in faculty development for online instruction, as well as in developing a corps of instructional designers and student support coaches to better serve students in exclusively online and hybrid course. The latter two types of resources are ripe for sharing across disciplinary and institutional boundaries.

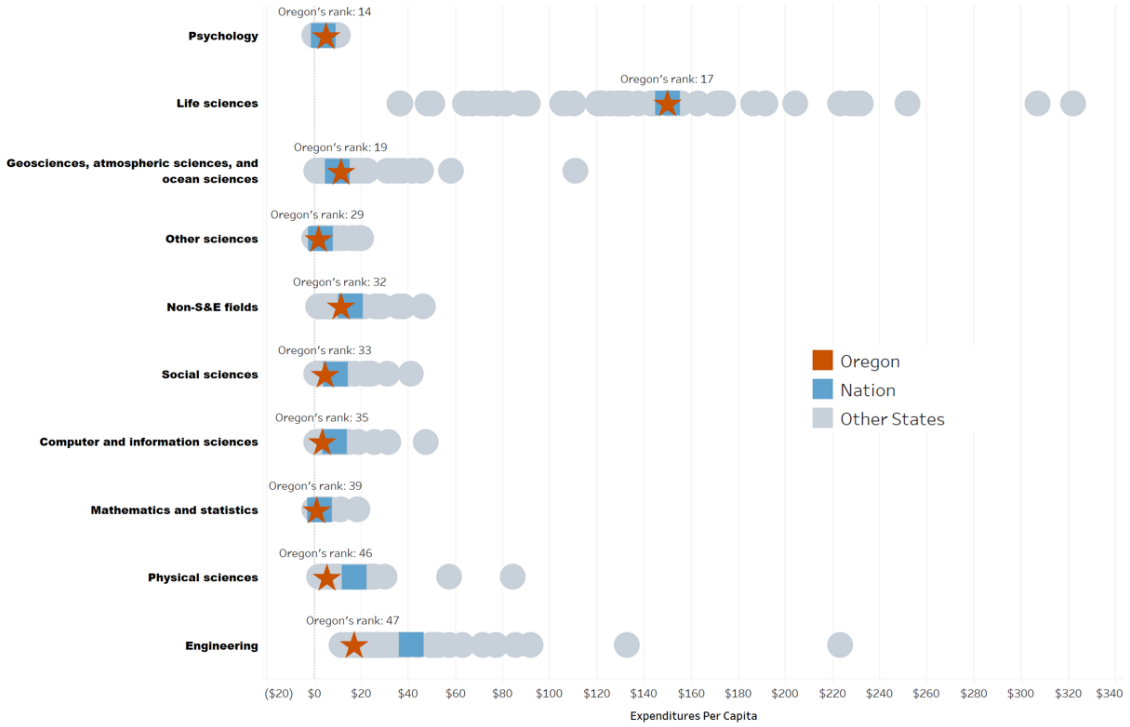
Oregon lags the nation in spending on research activity of all kinds, a condition that raises questions about the sustainability of Oregon's competitive position relative to other states (Figure 71). Breaking spending down by disciplinary cluster offers some insights about where investments are likeliest to pay off in raising Oregon's standing among states in research activity (Figure 72). That is, if Oregon is going to make an investment in boosting research productivity, perhaps as part of a strategic economic development plan linked to attracting or developing and retaining businesses in a particular industry, these data are instructive. They show that Oregon is most competitive in psychology, life sciences, and earth sciences, but its ability to rise in spending is very different for those areas. States that report more spending relative to their population, on research in the life sciences spend much more than Oregon does; for Oregon to make a significant move up these rankings and be better recognized as a center of excellence in life sciences, the state will take very substantial strategic investments (Figure 73). Moreover, Oregon's ranking in some disciplinary areas, such as computer science, is much lower than one might expect given how important those fields have been to the state's economy and to select, major employers.

Figure 71. Per Capita Research Expenditures, 2020



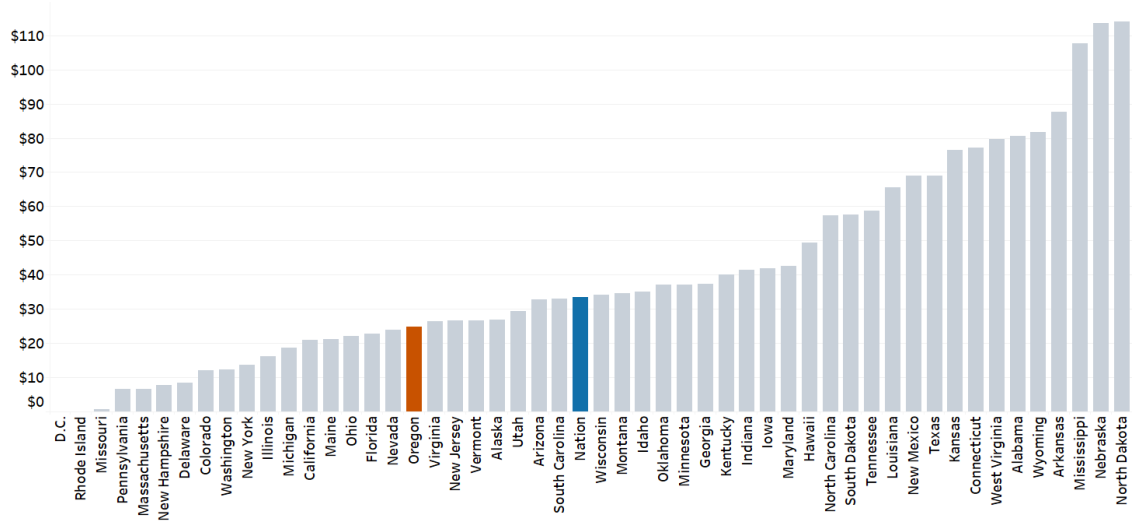
Sources: NSF-NCSES Higher Education Research and Development Survey (https://ncsesdata.nsf.gov/builder/herd) Total R&D Expenditures by Broad Field and Federal and Nonfederal Sources, Fiscal Year 2020; US Census Annual Estimates of the Resident Population for the United States, Regions, States, District of Columbia, and Puerto Rico: April 1, 2020 to July 1, 2021 (NST-EST2021-POP)

Figure 72. Research Expenditures Per Capita by Field, Oregon vs. Other States, 2020



Sources: NSF-NCSES Higher Education Research and Development Survey (https://ncsesdata.nsf.gov/builder/herd) Total R&D Expenditures by Broad Field and Federal and Nonfederal Sources, Fiscal Year 2020; US Census Annual Estimates of the Resident Population for the United States, Regions, States, District of Columbia, and Puerto Rico: April 1, 2020 to July 1, 2021 (NST-EST2021-POP)

Figure 73. State Investments in Research, Agriculture, and Medicine per capita, FY2021



Source: SHEEO SHEF, U.S. Census Bureau.

There are several areas in which investment in teaching and research infrastructure would be beneficial to the pursuit of these objectives. Among them are investments in:

- The development of a statewide economic development plan. Oregon has made a major investment in the semiconductor industry and maintains a statewide task force to help direct those investments and coordinate related activity. These commitments are timely given the recent passage of related federal legislation, and they actively engage government, industry, and higher education in a common quest to drive an important part of the state economy forward. More of this kind of coordinated activity is called for. Furthermore, this effort should be thoughtfully integrated in a comprehensive statewide economic development strategy that defines Oregon's comparative economic advantages, drives investments to elevate those industries through related research and development, advances efforts to recruit and retain key employers, boosts support for entrepreneurial and business development activities, and powers the creation and expansion of a talent base to serve them. The strategy should also synthesize efforts across industries and identify and seek to resolve gaps in residents' ability to participate fully, in particular with Oregon's Equity Lens in view. Lacking a state strategy for expanding the economy and the opportunities for individuals that comes with job creation, Oregon is out of step with the states with which it competes economically. From such a plan would flow several follow-on investments such as:
    - Investment in research infrastructure that would make the state attractive to industries dependent on high-end talent and seed the development of home-grown companies.
    - The identification of academic programs needed to support development of the necessary workforce, particularly in traded sector industries.
    - Support for efforts to eliminate barriers to full participation in identified in-demand jobs and industries.
- The necessary infrastructure for more extensive delivery of shared academic programs. The objective should be to ensure that programs can be delivered wherever in the state they are needed using existing educational assets. This requires common IT platforms and other capacities.
- Basic organizational structure to support the performance of shared administrative services.

5. Where might strategic changes in the current organization, structure, and policy of higher education in Oregon be made to advance the higher education goals of the state, the missions of respective institutions, and contribute to economic development and social mobility in the state?

Answers to this question flow from answers to the other questions and alignment of state policy with state goals. Important changes include:

- Being more explicit in the establishment of state goals about such priorities as
    - Linking higher education to the economic development needs of the state.
    - Ensuring that regional, as well as statewide, workforce needs are met.
    - Collaborating in the delivery of services.

    - Affordability for students, with special attention to adult and part-time students.
- Better aligning the funding models with state goals.
    - For community colleges this means that rewards for degree production should reflect contributions to regional, not just statewide, needs.
    - For universities, it means recognizing their contributions to the state's strategic economic development strategy and goals, as well as successfully educating Oregon residents at the undergraduate and graduate levels. Research competitiveness should also be rewarded for selected institutions. In addition, strong consideration should be given to rewarding institutions for contributions to the state's skilled workforce if they educate out-of-state students who remain in the Oregon workforce after graduation.
    - For all institutions, there should be established an investment fund that can be tapped with HECC and legislative approval for creation of new capacity. This capacity should be broadly defined to include:
        - Creation of new, high-cost programs.
        - Funding the infrastructure for support of shared services.
        - Acquisition of expensive research equipment needed to support programs critical to economic development in the state.
- Oregon should be more strategic in making investments with one-time funds that can generate institutional savings or produce new revenue for institutions.
- For students, the revision/expansion of student aid programs so that they better meet the needs of part-time adult students. In this context, think seriously about creation of earn and learn financial aid programs—a state work-study program. Examples exist in Arizona and Washington.
- Consider revisions to the program approval process.
    - For universities, base approval on a determination of whether or not a requested program is within an agreed-upon operational mission. Reserve the full program review process for instances in which falls outside the mission—essentially making approval of the program a change to institutional mission.
    - For community colleges (whose missions are to serve the needs of the students and employers in their district), presume that college leadership will be prudent in allocating scarce resources to new programs and speed the process for adding new programs to the list of approved programs.
    - Seek ways to use the program review and approval process to stimulate collaborations across institutional boundaries wherever possible, in order to ensure that programs that address localized workforce needs or student demand are available and delivered efficiently and affordably. HECC's efforts to help promote such collaboration should also engage OHSU. OHSU participates in program review activities as part of the Statewide Provost's Council, and it has established numerous constructive partnerships with public institutions to collaborate on programs where interests align. Yet institutions report a desire for deploying additional capacity in allied health and related programs at the undergraduate level to meet local workforce needs beyond what currently exists and in a manner

that is more flexible for the institutions. In this regard, HECC can exercise its planning authority to address these localized workforce needs, in consultation with public institutions, preferably by creating conditions that yield better and more streamlined collaboration between institutions, including OHSU.

6. **What are some promising innovations in curriculum design, delivery modalities, pedagogy, and degree design that Oregon's higher education institutions should explore in order to meet changing expectations and learning needs and interests of students?**

There is considerable evidence that students' primary reason for going to college is to prepare themselves for the world of work. Similarly, they tend to be retained better in programs that incorporate hands-on learning and real-world experiences. Existing practices have not always kept pace with these realities, but there is growing evidence that innovations can speed students' pathways to workforce-relevant credentials, sometimes at lower costs to them, without sacrificing quality. With this in mind, the following are examples of approaches that might be explored:

- Competency-based education (CBE). The poster child for this type of education is Western Governors University, but there are numerous examples of such programs on a smaller scale. Salt Lake Community College has moved its CTE programs into this format and the Utah System of Higher Education is moving to CBE in the general education components of transfer programs as a device to smooth the articulation process. Austin Community College has adopted this approach in some of its CTE programs. The benefits are that students have a transcript that indicates demonstrated competence in areas important to those making judgments about preparation for either further college work or for employment.
- Upside down curriculum—ensuring that students get workplace skills and some form of workplace certification in the first semester of their college experience. The Tennessee Board of Regents is moving toward a pilot of curricula that are designed in this way. The motivation was both to improve retention but also to ensure that students who are not retained to the completion of an associate degree leave with something of value.
- Design of programs that integrate work experiences into the academic program. Northeastern University's Co-op Program is a leading example of this, but there are other examples on a less grandiose scale. It is not uncommon for institutions to have an internship experience as an element of a program. The key is to make those internships 1) paid and 2) eligible for credit. The automotive tech program at Baton Rouge CC is a good example of such a program. The State of Washington has a state-funded work-study program designed with these principles in mind; its program is more geared to universities than community colleges but there is no reason it should be limited in this way.
- Scheduling optimization—some institutions and even some state systems (like the Virginia Community College System) are using data to better understand and deploy ways of streamlining the academic schedule that can improve student success, reduce barriers to credential completion, and be more efficient. The ASAP program at CUNY includes scheduling optimization (along with a variety of student support innovations) as part of its design.

- Develop new pathways to low-cost academic degrees. While there has been considerable attention to announcements of low-cost degree programs (such as the $10,000 bachelor's degree challenge issued in Texas some years ago), there are actual examples of such programs achieving success when they are well designed, aligned with employer needs and student demand, and offered at scale. One prominent example is Georgia Tech's online master's program in Computer Science.
- Any approach to delivering courses that make them more accessible to working students—classes at night and on weekends, courses that meet for a single extended period each week, short (5- to 7-week) courses, and courses that start more frequently than the beginning of the semester.

7. Based upon knowledge of the evolving higher education landscape, how and where might Oregon's higher education institutions find promising strategies for collaboration that would advance student access to programs, student success, and potential cost efficiencies? Also, how might expanded cooperation with other educational systems such as K-12 school districts, apprenticeships, proprietary schools, and on-line institutions strengthen learning pathways into higher education and overall educational achievement in Oregon?

HECC conducts annual evaluations of the seven public universities in the state. A part of that evaluation details each institution's collaborative activity and participation in USSE shared administrative services.[19] In general, the section on collaborative activity in these reports focuses on participation in inter-institutional governance and planning forums (e.g., Council of Presidents); participation in statewide agreements and non-profits related to contracting, construction, internet access (NERO/Link Oregon), small business development (RAIN), library services (Orbis Cascade Alliance); and various collaborative activity of an academic nature. Across the universities, the reports describe an array of efforts, including:

- Regional academic partnerships, e.g., SOHEC, co-admission to OIT and partnering community colleges
- WOU's Willamette Promise, providing assessments for awarding college credits to high school students as an alternative to traditional dual credit opportunities.
- Oregon Manufacturing Innovation Center Research and Development (OMIC), a joint effort involving OIT, OSU, and PSU to conduct applied manufacturing research, including shared activity. Funding comes partially from the institutions, private industry, the state, and some localities.
- Program pathways, particularly for health programs offered in partnership with OHSU. OSU has supported several partnerships with other universities: agricultural sciences degree offered at EOU, which I think EOU has backed away from more recently; ecosystem workforce program with UO to provide applied research and policy resources to the state; and joint enrollment with community colleges.

[19] These evaluation reports are all captured on HECC's publications website at https://www.oregon.gov/highered/research/Pages/reports.aspx. The most recent reports for EOU, OIT, SOU, and WOU are for 2021; others' reports are for 2020.

- Shared facilities, e.g., Fourth and Montgomery Building to be shared by PSU, PCC, OHSU, and the City of Portland.
- Consistent attention (and typically verbatim language) discussing efforts to smooth transfer pathways, develop MTMs, etc.

There exists little evidence of collaborations occurring in online education and, apart from the OHSU agreements, few joint programs. Among those that were mentioned were: a joint bioengineering doctoral program at OU and OSU, PSU and UO are partners in a "Joint Campus" program that gives graduate students access to courses at the other campus without affecting their registration at their "home" institution. No doubt there is other collaborative academic activity that grows out of the shared interests among faculty at multiple institutions as well. These examples certainly indicate a willingness to collaborate, as do the public and private expressions of institutional leaders, but the issue remains one of scale, and a lack of sufficiently compelling incentives for institutions to take on the hard work of setting up and sustaining collaborations.

In numerous states collaborations across institutions, sectors, and types of organizations on administrative services are being used to achieve efficiencies. Since the dissolution of the Oregon University System, most institutions have maintained their participation in USSE offerings, even though the legislative requirement that compelled that participation has lapsed and recent desertions have raised questions about its necessity over the long term. UO elected to develop the capacity to provide most of the USSE-offered services internally, though it still participates in statewide collective bargaining. PSU has opted out of financial reporting, bank reconciliation, and endowment services. Others may follow. USSE operates on a fee-for-service basis. It is likely that its capacity to deliver economies of scale is tied to ongoing participation by either PSU or OSU, or both. Other states have seen collaborations in a variety of administrative services:

- Purchasing—Virginia and other states. In addition, the Midwest Higher Education Compact offers shared service arrangements on purchasing, risk management, and other services in ways that make them open to Oregon institutions' involvement.
- Library services
- Information technology
- Student Record Systems

In managing a shared services enterprise, there are some best practices, including:

- The use of technology to automate repetitive tasks.
- Among the most easily replicable services are educational programming (webinars) and consulting services across a collection of institutions (as in a system, but such a practice could be adapted for Oregon's more independent institutions).
- The definition of measures to document time and costs saved, as well as a method to track how any efficiencies gained are reinvested.
- Shared governance of an activity.

- Recognition of the different motivations of different institutions to participate—it is not necessary that all participate, especially in a proof-of-concept phase.
- Short-term costs will be higher—a realistic assessment of cost savings, with attainable goals, is needed, and it should be given sufficient time.
- Cost-sharing is necessary; institutions should have some "skin in the game." Being clear about what level of ongoing support is necessary for the activity to be sustainable is also critical—there is likely to be lingering "costs" associated with managing an activity across otherwise independent processes, procedurals, reporting lines, etc. that should be recognized. It may be overly optimistic to assume that the only costs worth counted are those expressed in dollars as the sole determinant of whether a collaborative activity is sustainable.

In sum, Oregon has not enough collaboration across universities in administrative services and, apart from continual conversations about transfer and articulation that span the sectors, too few efforts to collaborate on program delivery.

EXHIBIT G
REPORT ON FINDINGS AND RECOMMENDATIONS FOR 2023 LEGISLATIVE SESSION

SEE ATTACHED

Joint Task Force on Student Success for Underrepresented Students in Higher Education

Report on Findings and Recommendations for 2023 Legislative Session

December 13, 2022

TASK FORCE MEMBERS

Representative Teresa Alonso Leon, Chair, House District 22
Senator Michael Dembrow, Senate District 23
Senator Lynn Findley, Senate District 30
Senator Lew Frederick, Senate District 22
Senator Rob Wagner, Senate District 19
Representative Mark Owens, House District 60
Representative Ricki Ruiz, House District 50
Representative Jack Zika, House District 53

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Members:
Sen. Michael Dembrow
Sen. Lynn Findley
Sen. Lew Frederick
Sen. Rob Wagner
Rep. Mark Owens
Rep. Ricki Ruiz
Rep. Jack Zika

81st LEGISLATIVE ASSEMBLY
JOINT TASK FORCE ON STUDENT SUCCESS FOR UNDERREPRESENTED STUDENTS IN HIGHER EDUCATION

State Capitol
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Salem, OR 97301
PHONE: 503-986-1664

December 13, 2022

To Speaker Rayfield and President Courtney:

Submitted herewith is the final report of the Joint Task Force on Student Success for Underrepresented Students in Higher Education. This task force was created by House Bill 2590 (2021) for the purpose of developing student success policy and funding proposals that are based on conversations with students who are underrepresented in the bodies of students at public post-secondary institutions of education in this state.

The members of the task force spent many hours over the last year visiting public higher education institutions across the state and meeting with students from underrepresented backgrounds. These trips included officially organized field trips to Portland State University, Mt. Hood Community College, Lane Community College, the University of Oregon, Western Oregon University, Eastern Oregon University, Treasure Valley Community College, Southern Oregon University, and Rogue Community College. In addition, on July 19, 2022, I visited Southwestern Oregon Community College in Coos Bay, Oregon. The visit mirrored other full task force visits, including roundtable discussions with leadership, local stakeholders, and faculty and staff. I had lunch with students from the College's Culinary Arts program and toured the College's campuses with an emphasis on resources utilized by underrepresented students.

It has been an honor to serve as Chair of the Joint Task Force on Student Success for Underrepresented Students in Higher Education. Since day one as a legislator, I have elevated and advocated on issues related to post-secondary higher education because as a first-generation, low-income student I know how life-changing post-secondary higher education can be for all people, especially our underrepresented students.

I believe the work of our task force, doing site visits, talking to students and key stakeholders and developing policy ideas in our workgroups will have a positive impact and help transform our post-secondary education system to better serve our underrepresented students, retain and graduate our students to be ready to join and impact our workforce.

Sincerely,

Representative Teresa Alonso Leon, Chair

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EXECUTIVE SUMMARY

Background

The Joint Task Force on Student Success for Underrepresented Students in Higher Education (JTUSHE) is a bicameral legislative task force established by House Bill 2590 (2021). The measure charges the task force with visiting public post-secondary institutions of education in order to meet with current, former, and prospective students from underrepresented backgrounds, and with developing policy and funding proposals that focus on increasing the likelihood of student success for underrepresented students in the areas of access, retention, graduation, and entry into the workforce. The bill also authorizes the task force to presession file legislation for the 2023 session and directs the task force to issue a report by December 15, 2022.

Process

Between March and July 2022, the task force conducted four two-day site visits to nine higher education institutions across the state. The task force also conducted virtual site visits to additional higher education institutions and correctional facilities where adults in custody participate in education programs. During these visits, the task force members held roundtable discussions, small-group conversations with underrepresented students, and formal public meetings in order to learn about the barriers to student success faced by underrepresented students.

Due to construction at the Capitol and the ongoing COVID-19 pandemic, the task force met virtually on a regular basis throughout the interim when it was not conducting site visits. These meetings featured presentations by subject matter experts, state agency staff, and higher education stakeholders in addition to public comment from students.

Following the site visits, the task force formed three work groups to focus on policy development: Financial Aid and Affordability, Student Support and Wraparound Services, and Systemic Accountability and Continuous Improvement. Each work group was co-chaired by two task force members and consisted of interested stakeholders, including students. The work groups met regularly from September through November 2022. Each group solicited policy proposals from participants, which form the basis of the task force's findings and recommendations.

Findings, Recommendations, and Policy Proposals

Financial Aid and Affordability. The task force developed a set of findings, recommendations, and policy proposals related to addressing the financial barriers faced by underrepresented students, including the cost of attendance, housing, child care, and educational resources such as textbooks. The task force's findings and recommendations in this area focus on:

- increasing need-based financial aid for low-income students;
- expanding emergency and completion grants;
- expanding access to low-cost open educational resources;

- alleviating housing cost burdens for students;
- expanding access to child care;
- increasing mentoring and advising opportunities for prospective students;
- reinforcing benefits navigator positions on campuses; and
- examining the value of work-study opportunities.

Student Support and Wraparound Services. The task force also developed findings and recommendations related to providing supplemental on-campus support for underrepresented students who face additional barriers to completion compared to their peers. The task force's findings and recommendations in this area focus on:

- providing institutions with the resources to identify students in need of support;
- centralizing and promoting available support services on campuses;
- maintaining benefits navigators on campuses;
- increasing state support of institutional student support programs;
- expanding access to mental health services for students;
- addressing the needs of students with disabilities; and
- transitioning to corequisite learning models for developmental education.

Systemic Accountability and Continuous Improvement. Lastly, the task force developed findings and recommendations related to addressing nonprogrammatic and systemic barriers to student success for underrepresented students, including strategies to promote diversity, equity, inclusion, and accountability at every level of the state's higher education system. The task force's findings and recommendations in this area focus on:

- improving clear communication of student outcomes between public higher education institutions and the state;
- encouraging institutions to adopt hiring, training, and cultural competency practices that promote responsiveness to students' needs;
- recognizing additional expectations placed on diverse faculty and staff;
- a statewide initiative to develop equity-minded systems on campuses;
- addressing disparities between tenured and adjunct faculty;
- encouraging roles for institutional leadership positions for practitioners of diversity, equity, inclusion, and justice (DEIJ); and
- encouraging broader campus community involvement in institutional resource allocation decisions.

Access to Full Report

The full report can be found online *at the Oregon Legislative Information System (OLIS).*

PROCESS

Background

The Joint Task Force on Student Success for Underrepresented Students in Higher Education (JTUSHE) is a bicameral legislative task force that was created by House Bill 2590 (2021). The task force is charged with visiting public institutions of higher education in order to meet with students who are historically underrepresented in higher education settings, including students who:

- are "underrepresented" and "diverse" as defined in statute;[1]
- are from rural communities in Oregon;
- are from low-income families;
- experience disability;
- identify with a minority sexual orientation or gender identity;
- are undocumented; or
- have been in foster care.[2]

HB 2590 directs the task force to develop policy and funding proposals based on these conversations that aim to improve student success outcomes for higher education students from the above groups. Specifically, the bill requires that the task force's proposals address:

- "access, including recruitment, admissions, placement, cost of attendance, financial aid, and funding;
- retention, including student support, student services, transfer programs, increased diversity of faculty, housing needs, food insecurity, child care costs, health care costs, mental health care access, and counseling;
- graduation, including time to degree, career readiness, and student debt; and
- entry into the workforce, including internships, advanced and continuing education, job and career placement, assessment on the return on investment for attaining a post-secondary degree, the correlation between degrees awarded and job placement, and the correlation between student costs for higher education and earnings after graduation."[3]

Per HB 2590, the task force is also empowered to establish advisory subcommittees and to presession file legislation for the 2023 legislative session.[4] The bill directs the task force to report its findings and policy proposals to the Legislative Assembly by December 15, 2022.[5]

Membership on the task force is limited to four Representatives appointed by the Speaker of the House of Representatives and four Senators appointed by the President

[1] ORS 342.120 (2021) defines "underrepresented person" as a person who is Black, Hispanic, Asian, Pacific Islander, or Native American or Alaska Native. ORS 342.433 (2021) defines "diverse" as cultural or linguistic characteristics of a person who is Black, Hispanic, Asian, Pacific Islander, Native American, Alaska Native, or whose first language is not English.
[2] House Bill 2590 (2021), (1)(3)(a)-(h).
[3] House Bill 2590 (2021), (1)(5)(a)(d).
[4] House Bill 2590 (2021), (1)(12)(a)-(b).
[5] House Bill 2590 (2021), (1)(13).

of the Senate.[6] On October 8, 2021, Speaker Tina Kotek appointed Representatives Teresa Alonso Leon, Mark Owens, Ricki Ruiz, and Jack Zika. The following day, President Peter Courtney appointed Senators Kate Lieber, Rob Wagner, Art Robinson, and Lynn Findley. In addition, the President appointed Senators Michael Dembrow and Lew Frederick as *ex officio* members. On March 9, 2022, the President discharged Senator Lieber and appointed Senator Dembrow as a full member. On December 5, 2022, the President discharged Senator Robinson and appointed Senator Frederick as a full member.

Due to construction at the Capitol and the ongoing COVID-19 pandemic, the task force met virtually when it was not conducting a campus site visit. All campus site visits were also postponed until the interim period following the 2022 legislative session. The task force held its first meeting virtually on November 18, 2021. At this meeting, the task force organized itself by adopting rules of order and electing Representative Alonso Leon as chair.

In January 2022, Representative Alonso Leon, Chair, convened a planning group comprised of higher education stakeholders, culturally specific community-based organizations (CBOs), specialists in diversity, equity, and inclusion (DEI), business and industry representatives, staff from the Higher Education Coordinating Commission (HECC), the Oregon Department of Education (ODE), the Governor's education policy office, and staff from the legislature's BIPOC caucus and House Majority Office. The planning group discussed the main topics to be covered by the task force, the format and agenda of site visits, whether visits would be in-person or virtual, and how to appropriately represent the geographic regions and the diversity of students served by Oregon's public institutions of higher education. The planning group also considered a proposed strategic plan for communications and outreach to promote awareness of the task force's activities among the intended audience of underrepresented students. The recommendations from this group would form the basis of the task force's work plan thereafter. The final version of the task force's work plan is included in this report as Appendix A.

The task force continued to hold regular meetings throughout the remainder of the 2021-2022 interim, except during the 2022 regular session and while work groups were meeting between September and November 2022. Each virtual meeting covered one of the topics listed in HB 2590 as priorities for addressing the needs of underrepresented students: access, retention, graduation, and entry into the workforce. These meetings featured guest speakers with expertise on each subject and a public comment period which allowed students from underrepresented backgrounds to share their experiences with the task force members.

Following the regular session, the task force embarked on a series of two-day site visits at public institutions of higher education around the state, starting with visits to institutions in the Portland metropolitan area on March 30 and 31, 2022. The task force conducted three additional regional site visits to the Willamette Valley on April 25 and

[6] House Bill 2590 (2021), (1)(2)(a)-(b).

26, Eastern Oregon on May 10 and 11, and Southern Oregon on July 20 and 21. The task force also conducted an online “virtual site visit” to institutions in Central Oregon on May 31, 2022, and Representative Alonso Leon, Chair, personally visited Southwestern Oregon Community College on July 19, 2022 to listen on behalf of the Task Force. During a virtual meeting on July 14, 2022, the task force also conducted a “virtual site visit” to Snake River Correctional Institution and Coffee Creek Correctional Facility to meet with incarcerated students at those institutions who are enrolled in higher education in prison programs.

With the conclusion of the site visits in July 2022, the task force transitioned into a policy development phase. Three advisory work groups were appointed to reflect on what was learned at the visits and develop policy proposals to address the issues that emerged. Each work group was co-chaired by two task force members and included interested stakeholders and students who participated in discussions and put forth policy recommendations. The work groups met from September 7, 2022 through November 4, 2022.

The full task force reconvened on November 17, 2022 to consider the work groups’ findings, recommendations, and policy proposals and to direct the drafting of this report. The task force met for a final time on December 13, 2022, to approve the final report and introduce several placeholder legislative concepts (LCs) for the 2023 regular session.

Campus Site Visits

Immediately following the 2022 regular session, the task force began its main objective of visiting public institutions of higher education in order to meet with underrepresented students. Each visit generally consisted of two consecutive full-day visits to at least two campuses in the same region, with one day’s events hosted at a public university and the other at a community college. The agenda for each day followed the following format:

1. a roundtable discussion with campus and community leaders, including institutional presidents, board members, K-12 education partners, community-based organizations, and business representatives;
2. a roundtable discussion with members of the campus community, including faculty and staff who work directly with underrepresented students, such as instructors, admissions counselors, mental health practitioners, and academic advisors;
3. small group listening sessions with underrepresented students where students shared their experiences with the task force members;
4. a tour of the campus, featuring facilities and services that serve underrepresented students; and

5. a formal public meeting during which the task force heard comments from students and the public.

Portland Metro Area. The task force's first site visit was to the Portland metropolitan area, hosted by Portland State University on March 30, 2022, and Mt. Hood Community College in Gresham on March 31, 2022, respectively. The task force spent a full day at each campus. Representatives from other public higher education institutions in the region, including Oregon Health and Science University, Portland Community College, Clackamas Community College, and Oregon Institute of Technology's Wilsonville campus, also took part in the roundtable discussions, small group student listening sessions, and public comment periods.

Willamette Valley. The task force spent the morning of April 25, 2022, at Lane Community College in Eugene, where it held back-to-back roundtable discussions, and moved to the University of Oregon for the remainder of the day, consisting of a student listening session, site tour, and public comment period. The following day, April 26, 2022, the task force visited Western Oregon University in Monmouth, which also featured participants from Oregon State University, Chemeketa Community College, and Linn-Benton Community College.

Eastern Oregon. On May 10, 2022, the task force spent the day at Eastern Oregon University in La Grande. The task force visited Treasure Valley Community College in Ontario the following day. Both meetings also featured participants from Blue Mountain Community College in Pendleton.

Southern Oregon. The final site visit was to Southern Oregon University in Ashland on July 20, 2022, and Rogue Community College's Table Rock Campus in White City on July 21, 2022. On both days, the task force was able to meet with students and stakeholders despite the summer break.

Additional documents from these site visits are included in Appendix B. The full record of the task force's site visit activities is available on the Oregon Legislative Information System (OLIS) and the task force's public-facing website.

Virtual Meetings

Central Oregon Virtual Site Visit. Due to the scheduling of Legislative Days in June, the task force was unable to travel to Central Oregon as originally planned. In lieu of a field trip, the task force held an all-day virtual meeting on May 31, 2022, to host representatives and students from Oregon Institute of Technology, Oregon State University-Cascades, Central Oregon Community College, and Klamath Community College. The format of the meeting mirrored that of the site visits, featuring two roundtable discussions, a private listening session with students, a set of presentations by the institutions instead of a site tour, and a virtual public comment period. A summary of the listening session is included in Appendix B.

Other Virtual Meetings. In addition to the site visits, the task force held monthly virtual

meetings from November 2021 through July 2022. Each meeting consisted primarily of informational presentations that focused on a particular topic, such as the state's equity lens and adult education goals, the role of education in workforce development, financial aid and student debt, and the four topics named in the bill as priorities: access, retention, graduation, and entry into the workforce. Several of these meetings featured national experts as well as representatives from state agencies, institutions, and public comment from students. Below is a brief description of the topics covered at these meetings.

November 18, 2021. The task force held its initial organizational meeting to adopt rules and elect a chair. The task force then heard a review of its charge as outlined in HB 2590, followed by the first of two presentations from HECC staff on principles of equity in policymaking and the current indicators of outcomes for underrepresented students in the state's system of higher education.

December 16, 2021. The task force heard the second part of the presentation from HECC on principles of equity in policymaking and the current indicators of outcomes for underrepresented students in the state's higher education system. Staff from the House Majority Office also presented a proposed communications and outreach strategy to the task force.

January 10, 2022. The task force heard an update on the planning work group that met earlier that month. Additionally, staff from the Oregon Office of Economic Analysis presented on the state's workforce needs for the future and current disparities in educational attainment across Oregon's demographic groups. There were also presentations from HECC staff and representatives of Oregon's public higher education institutions.

April 21, 2022. The theme for this meeting was underrepresented students' access to higher education. HECC Executive Director, Ben Cannon, presented on college-going rates across the state, the influence of high school advisors, corequisite models, financial aid applications, and developmental education. Presenters from public universities and community colleges gave their perspectives on admissions criteria and barriers to access.

May 19, 2022. The theme for this meeting was affordability, including financial aid and student debt. Dr. Louise Seamster of the University of Iowa presented the challenges students face regarding debt and the cost of pursuing higher education. She argued student debt shapes lives, is regressive, and is a significant driver of wealth inequality. Dr. Seamster also referenced studies reporting that over 20 years, five percent of Black former students studied had paid off student debt, compared to 94 percent of white students. Ben Cannon, HECC Executive Director, spoke to the task force on the state's current financial aid grant programs. He spoke of a multi-dimensional problem, highlighting the realities that Oregon is far below the U.S. state average for state

funding of financial aid; costs to students to pay for public higher education have risen 50 percent over 10 years, and those costs hit low-income students and families the hardest. Presenters from public universities and community colleges gave their perspectives on financial aid and the cost of attendance.

June 16, 2022. The theme for this meeting was student retention. Dr. Frank Harris III of San Diego State University defined equity and its qualities, and presented a framework for policymakers and institutions to develop equitable policies that help underrepresented populations. His recommendations included investing in a robust state data system that supports equity-minded institutional research, requirements for high school students to complete and submit higher education applications alongside targeted dual enrollment programs, and clear equity benchmarks and plans for the state's 40-40-20 education attainment goal. He then engaged in a bipartisan question and answer session with members. This was followed by presentations from HECC Executive Director, Ben Cannon, and representatives of public higher education institutions on student retention and drop-out rates. The task force also heard an informational presentation from Legislative Policy and Research Office (LPRO) staff on Minority-Serving Institutions (MSIs) that highlighted which higher education institutions in Oregon are considered MSIs.

July 14, 2022. The theme for this meeting was workforce preparation. The task force heard presentations from HECC staff and institutional representatives on graduation rates, the earning potential associated with completing a degree or certificate, and career counseling. This meeting also featured a virtual site visit that involved a private listening session with students incarcerated at Coffee Creek Correctional Facility in Wilsonville and Snake River Correctional Institution in Malheur County. A summary of this visit is included in Appendix B.

Work Groups

Following the conclusion of the site visit phase, the task force paused its regular meeting schedule and divided into three work groups whose topic areas were based on prominent themes that emerged from the visits: financial aid and affordability, student support and wraparound services, and systemic accountability and continuous improvement. Each work group was co-chaired by two task force members and staffed by the Legislative Policy and Research Office (LRPO). The purpose of these work groups was to reflect on the themes that emerged during the site visits and deliberate on policy solutions that address the causes of inequitable outcomes for underrepresented students.

A survey was sent out to recruit participants from the pool of individuals who had participated in the planning group, attended the site visits, or otherwise expressed interest in the work of the task force. Nearly 100 individuals responded to the survey. At

the direction of Representative Alonso Leon, Chair, membership in each work group was further divided into participants and observers. The work groups began meeting in early September 2022 and had developed findings, recommendations, and policy proposals to submit to the full task force by early November 2022.

Work Group 1: Financial Aid and Affordability. The work group on financial aid and affordability was co-chaired by Senator Dembrow and Representative Zika and met four times on September 8, September 20, October 18, and November 1, 2022. This work group was charged with addressing underrepresented students' affordability challenges, including accessing financial aid, the overall cost of pursuing higher education, and students' ability to meet the cost of basic needs in addition to the cost of attendance.

Meetings of this work group featured presentations by HECC staff on the state's equity lens, financial aid programs, proposed policy option packages, and an analysis of cost drivers at the state's public institutions of higher education. The work group also heard presentations from Washington State Representative Vendana Slatter and Michael Meotti, Executive Director of the Washington Student Achievement Council, on recent expansions to that state's student grant aid program.

Lastly, work group participants were asked to submit their own policy proposals through an online portal and were invited to present their proposals to the group for discussion. After participants had submitted policy proposals and presented them to the group, Senator Dembrow commissioned a survey that asked participants to rate their approval of each proposal. The results of this survey are presented in Appendix D

Work Group 2: Student Support and Wraparound Services. The work group on student support and wraparound services was co-chaired by Representatives Owens and Ruiz and met five times on September 7, September 20, October 5, October 20, and November 3, 2022. This work group was charged with analyzing programmatic best practices for supporting underrepresented students on campuses, including academic advising, mentoring programs, cultural responsiveness, and mental health supports.

The work group began with a presentation from HECC staff on the state's equity lens and equity-centered decisions in policymaking. Subsequent meetings featured presentations on the following: a proposal on Hunger Free Campuses from Representative Bobby Levy's office; a discussion of student support programs from the Oregon TRIO Association, College Possible, and the Oregon Student Success Center; and a panel of benefits navigators employed at various institutions under the program established by House B 2835 (2021). The work group co-chairs also directed LPRO staff to conduct a statewide survey of student support service providers at public higher education institutions to assess the prevalence of various support programs and services available at each institution. The results of this survey were presented at the October 5, 2022 work group meeting and are posted to the task force's public-facing website.

At the work group's first meeting, participants were invited to submit policy proposals through an online portal to be discussed at subsequent meetings. A portion of each subsequent meeting agenda was set aside for participants to present their proposals to the group for discussion. These proposals formed the basis of the work group's findings and recommendations to the task force.

Work Group 3: Systemic Accountability and Continuous Improvement. The work group on systemic accountability and continuous improvement was co-chaired by Representative Alonso Leon, Chair, and Senator Wagner and met five times on September 7, September 20, October 7, October 21, and November 4, 2022. This work group was charged with discussing the nonprogrammatic elements of improving higher education, including broader issues of culture and climate, integration of the K-12 and higher education systems, and the state's equity and adult education goals.

Before the work group met, participants were asked to submit policy recommendations through an online portal. At the first meeting, following a presentation from HECC staff on the state's equity lens, participants were given the opportunity to present their proposals to the group for discussion. Discussions on policy proposals continued through all subsequent meetings as participants continued to submit additional ideas. At later meetings, the work group heard presentations by LPRO staff and Dr. Robert Kelchen of the University of Tennessee, Knoxville on the significance of systemic accountability in higher education policy. At its final meeting, the work group collaboratively worked to finalize its findings and recommendations to the task force.

Final Steps

The task force reconvened on November 17, 2022. Following presentations by LPRO staff and Ben Cannon, HECC Executive Director, on the future of the task force's work, the co-chairs of each work group presented on their respective groups' findings, recommendations, and policy proposals. The task force also heard public comment from several individuals, including those who had taken part in the work group process.

Per HB 2590, the task force is empowered to presession file legislation for the 2023 regular session.[7] Because the task force had not yet determined its final policy recommendations in time for the September 23, 2022 deadline to request legislative concepts from Legislative Counsel, Representative Alonso Leon, Chair, requested the following legislative concepts as placeholders:

- LC 1998: "Relating to education funding;"
- LC 1999: "Relating to education funding;"
- LC 2002: "Relating to higher education funding;"
- LC 2004: "Relating to higher education;"
- LC 2005: "Relating to higher education;"

[7] House Bill 2590 (2021), (1)(12)(b).

- LC 2006: “Relating to higher education;”
- LC 2007: “Relating to education;”
- LC 2009: “Relating to education;” and
- LC 2010: “Relating to education.”

FINDINGS, RECOMMENDATIONS, AND POLICY PROPOSALS

The following section contains the findings and recommendations of the task force and was drafted by the members of the task force. These findings represent the culmination of what the task force learned during its site visits, remote meetings, and listening sessions with students, as well as through public comment periods and work group meetings. The recommendations represent the opinion of the task force on policy actions that ought to be taken in order to address the barriers that, according to the task force's findings, are predominantly impeding student success for underrepresented students in higher education. The policy proposals are summaries of proposed programs and legislation that were submitted by work group members and that each work group agreed to present to the task force. Because each work group followed a unique process, the description formats are not standard across all three groups. The original submitted proposals are presented in Appendix D.

Findings and Recommendations Related to Financial Aid and Affordability

Note: For the numbered items below, task force findings are in regular font, **followed by recommendations in bold font.**

Listed below findings and recommendations are *examples of related policies*, policy ideas submitted by work group participants or task force members that relate to the findings.

1. Overwhelmingly, students we spoke to stated that the cost of attendance at higher education institutions requires underrepresented students to make sacrifices not made by wealthier peers. These included taking fewer classes per term, stopping out and restarting, working multiple jobs, and other sacrifices that increase a student's time to completion, decrease a student's likelihood of completion, and create debt that often disproportionately burdens underrepresented students for decades after graduation. **Oregon should dramatically expand need-based financial aid opportunities for low-income students, both with the goal of expanding eligibility for state need grants higher up the income ladder and making significantly more aid available to low-income students. The state should revise its financial aid programs to accommodate the needs of working adults, who are becoming an increasingly large share of the student population across the state.**

Relatedly, the task force finds that:
I. The cost of attendance at Oregon's public universities and community colleges has increased continuously each year. The rate of increase has been higher for public universities than for community colleges.
II. Combined state and federal grant aid for a student at the lowest income level is insufficient to meet the full cost of attendance at many public institutions of higher education in Oregon.
III. There is a strong relationship between affordability and completion, with students more likely to graduate in less time when the cost of attendance is more affordable.
IV. The task force finds that high costs in housing, child care, elder care, transportation, and internet access are additional affordability challenges faced by underrepresented students.

Examples of related policies: (see WG1 survey results and member discussion for prioritized policy recommendations)

2. Even when receiving higher levels of financial aid investment, many students continue to face financial instability, emergency expenses, or running out of financial aid, often while unable to rely on family networks to assist in times of crisis. For these students, dropping out of college can be one car repair bill or a couple of lost work shifts away. The task force heard from students and staff that during COVID-19 shutdowns, federal emergency student aid grants kept students enrolled even when these emergencies arose. The task force also heard from students who ran out of financial aid funding to finish one last class or term before their degree. **Oregon should provide**

consistent funding for emergency financial aid and completion grants, administered at the institutional level, that keep students enrolled through one-time or transitory emergency situations. Students facing these hurdles should be connected with advisors and benefits navigators to provide holistic support.

Example of related policies: WS-1

3. Direct student subsidies are not the sole mechanism by which student costs can be reduced. While Oregon currently lacks the resources to significantly reduce tuition for all students (a goal it should aspire to meet), small targeted investments can meaningfully reduce costs for significant numbers of students. Within higher education, it is textbook costs that have increased most dramatically. **Access to open educational resources, course materials that are free or low cost to students and freely modifiable by faculty, should be further expanded, with particular focus paid to alignment with ongoing common course numbering and transfer pathway work.**

Examples of related policies: FA-3 and FA-4

4. Oregon is in an ongoing housing crisis, and this crisis puts intense strains on underrepresented students including pushing students out of housing or far away from campus. While this crisis is not unique to students, institutions of higher education are unique environments where unique opportunities may exist to help students be and remain housed. **A statewide work group of higher education, housing, finance, and other experts and stakeholders should be established to examine the question of student housing availability and funding with the goal of crafting specific, actionable recommendations to improve student housing availability, accessibility, and affordability. Additionally, campuses must be open and welcoming places for houseless students.**

Examples of related policies: FA-12, FA-13, FA-14, FA-15, FA-16, and FA-18

5. The state child care grant is underfunded and campus child care centers, where they exist, are oversubscribed. While campus-based centers are more oriented to the needs of student-parents, it may not be possible for all institutions to operate them. **There should be a review of the state child care grant and campus-based child care centers to determine what mix of direct student support and state grants to centers can meet the needs of the greatest number of student parents.**

Examples of related policies: FA-5 and FA-9

6. During site visits, the task force heard repeatedly that underrepresented students often require the greatest level of support pre-college, understanding available pathways, and gaining meaningful assistance in understanding higher education affordability topics, learning about financial aid opportunities, and completing the Free Application for Federal Student Aid (FAFSA) and related financial aid applications. As currently funded and implemented, the Oregon Promise grant is limited in promoting college-going among underrepresented students. **Funding for pre-college mentorship**

and advising activities, including FAFSA completion, will help more underrepresented students attend college by demystifying higher education and opening the door to financial assistance. HECC and ODE should work with institutions to investigate whether a direct, guaranteed admissions program would further open institutional doors to students.

Examples of related policies: FA-11, SD-9, and FA-19

7. The task force finds that burdensome requirements for public assistance, a lack of financial literacy, perceptions about the high cost of higher education, rising cost of living across the state, and high rates of food insecurity add additional challenges to underrepresented student success. **The task force recommends that the state continue to invest in the benefits navigator program and to streamline the ability of students in higher education to access public assistance programs. The legislature should expand funding to increase benefits navigator positions and/or expand funding and resources for their work.**

Examples of related policies: FA-10

8. Work study programs can provide eligible students with campus-based work opportunities that provide necessary income. It is currently, though potentially temporarily, the case that work-study eligibility makes a student eligible for SNAP benefits. At present, federal work study slots are likely underutilized, but this has not always been true, and may not be in the future. **Work-study utilization should be monitored for future opportunities to create state-funded slots for students, if it is determined they add value over the combination of increased need-based grants and outside employment.**

Examples of related policies: FA-1 and FA-5

Policy Proposals Submitted by Work Group Members. Members of the Work Group on Financial Aid and Affordability submitted the following proposals:

FA-1: Expanding Work-Study Options to Include Nonprofit Organizations
Description: This proposal would establish a pilot program at one or two public universities in which students are granted discounted tuition in exchange for working a paid position at a nonprofit organization. The program would be administered by a coordinator at each institution who would connect interested students with eligible organizations and implement the corresponding tuition discount.

Timeline of implementation: <12 months

Responsible entities: Higher Education Coordinating Commission and institutions

Impact on existing law or programs: Currently, the Federal Work Study program pays wages to students who work at on-campus, government, or nonprofit jobs as a form of

financial aid, but does not subsidize tuition. The State of Oregon does not operate a comparable program.

FA-2: Homeowners and Renters Tax Relief
Description: This proposal would re-institute a tax rebate for homeowners and renters to alleviate high housing costs that previously existed prior to the 1990s. Homeowners and renters under a specified income threshold could apply for a refund on their property or income taxes up to a certain amount.

Timeline of implementation: Unknown

Responsible entities: Department of Revenue

Impact on existing law or programs: Oregon previously allowed homeowners and renters to claim a state tax rebate on living expenses under a program known as Homeowners and Renters Refund Program (HARRP) (Legislative Revenue Office, 2001). This program was allowed to sunset around the time that voters approved Measure 5 and Measure 50 in the 1990s. There are currently no comparable tax relief programs, although the tax code contains several other credits and deductions.

FA-3: Learners Working for Affordable Materials (Part 1)
Description: This proposal would direct institutions to develop an electronic registration platform that connects course registration with online bookstores to accurately reflect the true cost of registering for a given course and better determine which courses could be considered “low-cost” and “no-cost”.

Timeline of implementation: 3-4 years

Responsible entities: Higher Education Coordinating Commission (HECC), Open Oregon Educational Resources program, public institutions of higher education

Impact on existing law or programs: House Bill 2919 (2021) required each public university and community college to prominently display estimated costs of course materials. This would expand the requirements under that bill.

FA-4: Learners Working for Affordable Materials (Part 2)
Description: This proposal would increase the legislative appropriations to Open Oregon Educational Resources above current service level (CSL) for the next biennium to a total of $4.5 million.

Timeline of implementation: Next biennium

Responsible entities: Legislative Assembly, Open Oregon Educational Resources

Impact on existing law or programs: Open Oregon Educational Resources is responsible for administering the state's Open Educational Resources (OER) program, which develops and promotes low-cost teaching and learning materials as alternatives to proprietary textbooks. The organization reports that a CSL appropriation for the next biennium would be $2.4 million.

FA-5: Support for Student Parents

Description: This proposal would establish child care services on Oregon public university and community college campuses, to be staffed by professional employees and students engaged in work study or internship opportunities who are primarily pursuing degrees in early childhood education and family sciences. Students enrolled at these institutions would not be required to pay for child care services, but members of the public would. *(see also: FA-9)*

Timeline of implementation: Prior to 2024-2025 academic year

Responsible entities: Public universities, community colleges, HECC, Department of Human Services (DHS)/Early Learning Division (ELD)/Department of Early Learning and Care (DELC)

Impact on existing law or programs: Every county in Oregon is recognized as a "child care desert," meaning that there is an inadequate supply of child care services to meet demand (Oregon State University, 2021). This proposal would require each institution to provide fully funded child care on campus that is also open to the public for a fee. Currently, students are eligible to apply for the Child Care Grant administered by the HECC's Office of Student Access and Completion, although the number of recipients is often fewer than 100 each year due to limited funds (Higher Education Coordinating Commission, 2022).

FA-6: Promoting Healthy Campuses

Description: This proposal would allow any credit-earning student to enroll in a Medicaid/Oregon Health Plan public insurance program such as OHP Basic or Citizenship Waived Medical.

Timeline of implementation: Prior to 2024-2025 academic year

Responsible entities: Oregon Health Authority, benefits navigators

Impact on existing law or programs: Eligibility for Medicaid programs is traditionally determined by an income threshold, among other requirements. This proposal would allow any student enrolled in a credit-bearing course or program to enroll in Medicaid, regardless of income.

FA-7: Affordability and Financial Aid Student Equity and Success (part 1)
Description: This proposal would expand the Oregon Opportunity Grant (OOG) maximum award to fully cover or nearly cover the cost of attendance at a public university or community college. In addition, it would remove the requirement that students be enrolled at least half-time to receive an award and allow students enrolled in nondegree certificate and training programs to receive an award. *(see also: FA-17)*

Timeline of implementation: 1 year

Responsible entities: HECC/Office of Student Access and Completion (OSAC)

Impact on existing law or programs: The OOG is Oregon's largest need-based student financial aid program. Currently, the maximum award for attending a university is $4,692 and $3,600 for a community college. Award amounts scale downward as reported income increases according to the Expected Family Contribution (EFC) on the FAFSA or ORSAA (Oregon Student Aid Application). Students must be enrolled at least half-time in a credit-earning degree program to receive an award. This proposal would expand the award amounts to cover the full cost of attendance and remove the restrictions on half-time enrollment and noncredit programs.

FA-8: Affordability and Financial Aid Student Equity and Success (part 2)
Description: This proposal would permanently fund the Oregon Tribal Student Grant Program, which fully covers the cost of attendance at an Oregon university or community college for students who are enrolled members of Oregon's nine federally recognized tribes.

Timeline of implementation: Next biennium

Responsible entities: HECC/OSAC

Impact on existing law or programs: The Oregon Tribal Student Grant Program was established as a budget line item for the current biennium in House Bill 5202 (2022). OSAC has begun accepting applications for the 2022-2023 academic year. However, the program will sunset at the end of the current biennium if it is not renewed or established permanently in statute.

FA-9: Affordability and Financial Aid Student Equity and Success (part 3)
Description: This proposal would increase funding for the Child Care Grant and issue grants to institutions to create or expand child care services on campuses to accommodate students with children. *(see also: FA-5)*

Timeline of implementation: 1 year

Responsible entities: HECC/OSAC

Impact on existing law or programs: The Child Care Grant is available in limited quantities to students with children to help meet the cost of child care, up to $10,000 per academic year. For the past several years, fewer than 100 individuals have received the grant in a given year (Higher Education Coordinating Commission, 2022). This proposal would allocate more funding to the grant program to allow more individuals to receive an award, while also addressing the supply side by providing financial assistance to on-campus child care services.

FA-10: Affordability and Financial Aid Student Equity and Success (part 4)
Description: This proposal would establish a regular program budget at each institution for its benefits navigator program. This would allow each benefits navigator to expand program offerings and outreach services beyond what is currently offered.

Timeline of implementation: 1 year

Responsible entities: HECC/OSAC

Impact on existing law or programs: HB 2835 (2021) established a statewide requirement for every public university and community college to hire a benefits navigator, who would assist students in applying for public assistance programs. This position may be less than 1.0 FTE if its responsibilities are combined with another position on campus.

FA-11: Affordability and Financial Aid Student Equity and Success (part 5)
Description: This proposal would allow families to pre-pay tuition via monthly contributions to a 529 savings plan.

Timeline of implementation: 1 year

Responsible entities: Oregon State Treasury, Department of Revenue

Impact on existing law or programs: Oregon currently operates the Oregon College Savings Plan, which allows individuals and families to make contributions to a tax-advantaged college savings account, known as a 529 plan. States may choose to structure these accounts either as savings accounts or as vehicles for prepaying future tuition at present-day rates. Oregon's plan currently only allows for the former.

FA-12: Affordable Rents for College Students (part 1)
Description: This proposal would allocate $1 million to the Affordable Rents for College Students (ARCS) program, which is operated by a nonprofit organization and provides subsidized housing for students in the Portland metro area.

Timeline of implementation: Next biennium

Responsible entities: College Housing Northwest and its partners

Impact on existing law or programs: The ARCS program provides subsidized housing for students enrolled at Portland State University (PSU), Portland Community College (PCC), Mt. Hood Community College (MHCC), and Clackamas Community College (CCC). Expansion of the program with additional funding would double the program's capacity to allow for roughly 100 students to be served with a 50 percent subsidy on rent.

FA-13: Affordable Rents for College Students (part 2)
Description: This proposal would appropriate $3-5 million to College Housing Northwest to acquire capital for additional housing supply and building maintenance.

Timeline of implementation: Next biennium

Responsible entities: College Housing Northwest and its partners

Impact on existing law or programs: College Housing Northwest's ARCS program provides subsidized housing for students enrolled at PSU, PCC, MHCC, and CCC. Expansion of the program with additional funding would allow the program to acquire additional housing units to provide to students at 30 percent of area median income (AMI).

FA-14: University Accountability Act (part 1)
Description: This proposal would require that universities commit to provide on-campus housing for a greater proportion of their student bodies that accommodates changes in enrollment. On-campus housing costs would be required to be comparable to private rental housing.

Timeline of implementation: 1-5 years

Responsible entities: HECC, institutions of higher education (particularly those with on-campus housing), Department of Land Conversation and Development, Oregon Housing and Community Services, Department of Consumer and Business Services

Impact on existing law or programs: Currently, higher education institutions provide on-campus housing and dining as auxiliary services that are funded though supplemental revenue rather than standard tuition and fees. Institutions are not required to provide housing for students.

FA-15: University Accountability Act (part 2)
Description: This proposal would also require all higher education institutions to report quarterly or each semester to the HECC on the impact that student enrollment has on the local housing market. A statewide task force or work group may also be convened.

Timeline of implementation: 1-5 years

Responsible entities: HECC, Department of Land Conservation and Development, Oregon Housing and Community Services, institutions of higher education

Impact on existing law or programs: Currently, the HECC does not play an active role in regulating or monitoring the impact of student populations in cities. House Bill 2003 (2019) required the Department of Land Conservation and Development (DLCD) and Oregon Housing and Community Services (OHCS) to jointly develop and conduct a housing needs analysis in every city in Oregon. That report found that the state is currently experiencing a shortage of about 140,000 homes (Oregon Housing and Community Services, 2021).

FA-16: University Accountability Act (part 3)
Description: This proposal would expedite the review process for affordable and student housing projects.

Timeline of implementation: 1-5 years

Responsible entities: institutions of higher education (particularly those with on-campus housing), affordable housing developers, cities and counties, DLCD, OHCS, Department of Consumer and Business Services

Impact on existing law or programs: Developers of housing projects must undergo an application and review process to ensure compliance with local zoning and building codes along with other requirements such as statewide land use laws. This proposal may have an impact on local land use regulations and municipal strategic plans as well as the state agencies that administer housing and development laws. For example, House Bill 2001 (2019) requires municipalities to submit housing plans to DLCD and to accommodate denser housing construction through zoning code changes.

FA-17: Increase Award Amounts for Oregon Opportunity Grant
Description: This proposal would increase the maximum award amount of the OOG for the lowest-income students who receive Pell grants or Supplemental Nutrition Assistance Program (SNAP) benefits. *(see also: FA-7, SD-6)*

Timeline of implementation: 2023-2024 academic year

Responsible entities: HECC/OSAC, DHS

Impact on existing law or programs: The current maximum award amounts for the OOG are $3,600 for full-time community college students and $4,692 for full-time university students. These amounts scale downward as reported income increases according to the EFC on the FAFSA or ORSAA.

FA-18: Recognizing Houseless Students and Families
Description: This proposal would require all higher education institutions to designate a zone on campus where students experiencing homelessness may reside, camp, park vehicles, and shower without being at risk of removal. Institutions would assist these students through the offices of the benefits navigators by connecting them with services.

Timeline of implementation: 3-6 months

Responsible entities: institutions of higher education, benefits navigators

Impact on existing law or programs: Institutions of higher education are not currently required to provide housing or accommodations for students who are experiencing homelessness. Oregon's housing assistance programs are administered through OHCS. According to the U.S. Department of Housing and Urban Development (HUD), in 2020, Oregon was among the states with the highest rates of overall homelessness (41 per 10,000 people) and unsheltered homelessness (60.6 percent of persons experiencing homelessness) (U.S. Department of Housing and Urban Development, 2021).

FA-19: Increasing Post-secondary Access and Matriculation for Black, Brown and Low-Income Oregonians
Description: This proposal would create a statewide campaign to improve FAFSA and ORSAA completion rates for students of color, including a digital media outreach campaign promoting the value of pursuing higher education; personalized virtual support for students applying for FAFSA/ORSAA, scholarships, and admission to higher education institutions; and a statewide text line that nudges interested students and provides support to interested students from underrepresented backgrounds.

Timeline of implementation: 2-5 years

Responsible entities: HECC/OSAC, partner organizations

Impact on existing law or programs: OSAC currently operates the FAFSA Plus+ program, which partners with high schools, community-based organizations, and other college support programs to promote FAFSA and ORSAA completion. OSAC also operates the ASPIRE mentoring program to promote college and career planning. This proposal may work in conjunction with those programs or create a new, separate program.

SD-1: Limit the Oregon Promise to students who are Pell eligible
Description: This proposal would modify the eligibility requirements for the Oregon Promise to only allow students who are eligible for the federal Pell grant to receive the grant.

Timeline of implementation: Unknown

Responsible entities: HECC/OSAC

Impact on existing law or programs: Currently, the Oregon Promise covers the cost of attendance at a community college and is available to individuals who have recently graduated from an Oregon high school with a 2.0 or greater GPA. The program is not income-limited, except when limited funds prevent awards to all eligible applicants. This proposal would curtail the eligibility requirements by only allowing individuals who qualify for the need-based Pell grant to receive a Promise award.

SD-2: End the Oregon Promise, incorporating its resources into the Oregon Opportunity Grant
Description: This proposal would eliminate the Oregon Promise grant program and transfer its existing funds into the OOG program.

Timeline of implementation: Unknown

Responsible entities: HECC/OSAC

Impact on existing law or programs: The Oregon Promise is a non-need-based program and is awarded to applicants who have recently graduated from an Oregon high school with a 2.0 GPA. This proposal would repeal the Oregon Promise and transfer its resources into the need-based OOG program.

SD-3: Expand the Oregon Promise to include free tuition for Pell-eligible university students.
Description: This proposal would allow individuals who are eligible for a federal Pell grant to use their Oregon Promise award at a university in addition to a community college.

Timeline of implementation: Unknown

Responsible entities: HECC/OSAC

Impact on existing law or programs: Currently, Oregon Promise awards may only be applied toward the cost of attendance at an Oregon community college. House Bill 2093

A (2021), which was not enacted, would have allowed Oregon Promise recipients to apply a comparable amount toward the cost of attendance at a public or private university. This proposal would allow Pell grant recipients to use their Promise awards to attend a university, while non-Pell-eligible Promise recipients would be restricted to using the award to attend a community college.

SD-4: Expand the Oregon Promise to include free tuition for eligible returning CC students along with those immediately out of high school.
Description: This proposal would expand the Oregon Promise eligibility requirements to include adult individuals without a degree who would be returning to pursue higher education at a community college.

Timeline of implementation: Unclear

Responsible entities: HECC/OSAC

Impact on existing law or programs: Currently, the Oregon Promise is open to individuals who have graduated from an Oregon high school in the previous six months. This proposal would expand the eligibility requirements to allow individuals with longer intervals since high school graduation to apply for the grant.

SD-5: Expand the Oregon Promise to include free tuition for eligible returning CC and university students along with those immediately out of high school.
Description: This proposal would expand the Oregon Promise to allow adult individuals without a degree who would be returning to higher education at either a community college or a university to receive an award.

Timeline of implementation: Unknown

Responsible entities: HECC/OSAC

Impact on existing law or programs: Currently, the Oregon Promise is open to individuals who have graduated from an Oregon high school in the previous six months and may only be applied toward the cost of attendance at a community college. This proposal would expand the eligibility requirements to allow individuals with longer intervals since high school graduation to apply for the grant and to apply the award toward the cost of attendance at a university in addition to a community college.

SD-6: Join Washington in using SNAP eligibility as an automatic indicator of Oregon Opportunity Grant eligibility.
Description: This proposal would modify the eligibility requirements of the OOG to automatically grant awards to individuals who receive SNAP benefits. *(see also: FA-17)*

Timeline of implementation: Unknown

Responsible entities: HECC/OSAC, DHS

Impact on existing law or programs: Currently, OSAC uses the EFC calculations in the FAFSA or ORSAA to determine financial need when awarding OOG awards. SNAP is a need-based program administered by DHS and has a separate set of eligibility requirements prescribed in state and federal law. This proposal would require OSAC to obtain SNAP enrollment information from DHS when making eligibility determinations for the OOG.

SD-7: Oregon Opportunity Grant
Description: This proposal would combine the state's existing grant aid programs, including the OOG, Oregon Promise, and Tribal Student Grant, into a single pool of funds, which would distribute aid to students in amounts based on a weighted formula. The factors in the weighting formula would include financial need, first-generation or returning student status, degree pathway, and full-time or part-time enrollment.

Timeline of implementation: Unknown

Responsible entities: HECC/OSAC

Impact on existing law or programs: Currently, the OOG is the state's only need-based grant aid program. Other grant aid programs, such as the Oregon Promise, the Tribal Student Grant, and the Child Care Grant, are awarded to students who fulfill certain eligibility criteria such as having recently graduated from an Oregon high school, being an enrolled member in a federally recognized tribe, or requiring assistance with child care needs. This proposal would eliminate those programs and establish a single grant aid program with multiple factors that would determine award eligibility and amounts.

SD-8: Institute a required high school course in planning for post-graduation that would introduce students to post-secondary options, filling out the FAFSA/ORSAA, and understanding and accessing resources.
Description: This proposal would require all school districts to provide a course in future education planning for all graduating seniors and make this course a requirement for high school graduation. This course would offer instruction in understanding and navigating the higher education system, applying for financial aid, career planning, and exploring options beyond high school.

Timeline of implementation: Unknown

Responsible entities: Oregon Department of Education (ODE), school districts

Impact on existing law or programs: Senate Bill 744 (2021) required ODE to issue a report recommending changes to Oregon's high school graduation requirements. That report recommended a future planning course for all graduating seniors, which would offer instruction on planning for post-secondary education, filling out FAFSA and ORSAA applications, financial literacy, career planning, and other skills (Oregon Department of Education, 2022). This proposal would implement that recommendation as a high school graduation requirement in statute.

SD-9: Learning Accounts

Description: This proposal would establish an incentive account program for low-income high school students, based on a similar program from New Brunswick, in which the state would deposit moneys into an account for each eligible high school student to be applied toward higher education expenses. There would be a graduated incentive structure, in which a certain amount would be deposited following the completion of 10th grade, followed by another deposit following 11th grade, and lastly the remaining award amount following successful high school graduation. Recipients would be required to pay back the funds if they do not enroll in a recognized post-secondary education program within a specified time.

Timeline of implementation: Unknown

Responsible entities: HECC/OSAC

Impact on existing law or programs: Although Oregon does not currently have such a program for high school students, the state operates two programs that bear comparison: the JOBS Plus program, operated by DHS and OSAC, allows participants to earn deposits into an Individual Education Account as part of a larger program of providing state-subsidized wages in lieu of SNAP or Temporary Assistance for Needy Families (TANF) benefits. In addition, the Oregon College Savings Plan allows individual families to deposit savings into a tax-advantaged account for higher education expenses.

Findings and Recommendations Related to Student Support and Wraparound Services

Note: For the numbered items below, task force findings are in regular font, **followed by recommendations in bold font.**

Listed below findings and recommendations are *examples of related policies*, policy ideas submitted by work group participants or task force members that relate to the findings.

1. Oregon's students are increasingly diverse, and report that institutional bureaucracy regarding advising and other services can be difficult to navigate, particularly for students who are first-generation or members of a racial-ethnic minority. Students

themselves often do not know if they are making navigation errors or encountering difficulties that make it less likely they will successfully complete their education. The task force finds that students from underrepresented backgrounds face additional challenges in higher education settings due to the "hidden curriculum" that prevents them from confidently navigating the system and completing their education at comparable rates to their peers. **The task force recommends that the legislature enact policies that allow institutions flexibility in adapting to the needs of an increasingly diverse student body. Institutions should develop proactive, systematic, and data-driven approaches to identifying students who are academically or financially at risk, and affirmatively connect those students to advisors and other campus services before students' difficulties evolve into noncompletion.**

Examples of related policies: WS-5, Effective Student Support and Wraparound Services Policy Priorities, Block Grant; WS-7, Scaling Oregon Guided Pathways

2. Relatedly, when students do understand what their needs are, program and service offerings on campus can be difficult to find, even when they exist on campus. The task force finds that underrepresented students report experiencing food and housing insecurity, barriers to accessing mental and behavioral health services, and challenges securing adequate transportation, child care, and internet access. **The task force recommends that knowledge and information about program and service availability should be better centralized and coordinated, helping students navigate services easier by searching fewer places and inquiring with fewer people.**

Examples of related policies: WS-4, Single Point Entry; WS-2, Campus Coordinated Care

3. The task force finds that the benefits navigator program has been successful in steering students toward available resources to assist with meeting their basic needs. **The task force recommends that the legislature continue to fund benefits navigator positions at each public institution of higher education in the state, and evaluate the benefits of expanding funding to increase these positions and/or expand funding and resources for their work.**

Examples of related policies: WS-3, Equity Achievement Act

4. It is not enough to change how students can be identified for and seek out services. As state investment has not kept pace with higher education inflation factors, institutions have not only increased tuition, but increased reliance on part-time employees and decreased service levels. These cuts, necessary to balance the books, affect underrepresented students significantly. In recent history, the legislature has provided just enough funding to buy down tuition increases. But these tuition guarantees do not leave room for institutional reinvestment. The task force finds that many successful programs and models exist at Oregon's higher education institutions that provide valuable wraparound support to underrepresented students. The task force finds that

students from underrepresented backgrounds benefit greatly from supplemental support services that are comprehensive and culturally responsive. **Academic and student supports must see greater levels of state investment that directly result in greater service levels, including by creating more full-time lines that can help institutions diversify campuses. The task force recommends that the legislature enact policies that ensure greater access and resources to wraparound services and support programs for underrepresented students that have been demonstrated to promote positive outcomes.**

Examples of related policies: WS-3, Equity Achievement Act

5. Following national trends, students increasingly list mental health concerns as impediments to college completion and full participation at institutions. While mental health challenges are increasingly a factor, quality, culturally competent remote health and counseling services are more available today than at any prior point. **Such mental health services should be made available and affordable to students. Institutions and the state should partner to make such services accessible, regardless of where a student enrolls.**

Examples of related policies: FA-6, Promoting Healthy Campuses

6. Federal laws and rules on the subject of students with disabilities in higher education are less prescriptive than those governing the K-12 system, and students often must be aggressive self-advocates for determinations and services. Students with disabilities report challenges in accessing appropriate supports and accommodations at institutions of higher education. **A work group should be formed to investigate whether statutory changes, policy changes, or investments would improve the experience and outcomes of students with disabilities in higher education, recommending such ideas to the legislature.**

Examples of related policies: WS-9, Disability Justice Action Plan for Oregon Higher Ed

7. Students often enter higher education with a need for further development of math and English skills. Traditionally, this development has occurred in courses that a student must complete prior to entry into the introductory college level course. But recent studies show that corequisite models, where students complete the college level course with additional, parallel academic support, better help students prepare for and complete their college program, without such students spending significant additional time and money. **Institutions must complete the transition to corequisite delivery of developmental education in math and English.**

Examples of related policies: WS-8, Corequisite Course Implementation at Oregon Community Colleges

Policy Proposals Submitted by Work Group Members. Members of the Work Group on Student Support and Wraparound Services submitted the following proposals:

Proposal WS-1: Retention Grants – Extending the Last Mile
Description: This proposal would fund grants to cover modest outstanding balances for Pell-eligible students ahead of class registration.

Timeline for implementation: Could be implemented quickly after passage

Responsible entities: Maximum grant size set by HECC, funds awarded and distributed by universities

Proposal WS-2: Campus Coordinated Care
Description: This proposal would create a network at each university that includes all student support offices (financial aid, undergraduate advising and counseling, registration, housing and financial advising) and assign each student a liaison to help them navigate the system.

Timeline for implementation: 2-3 years

Responsible entities: Best practices and models identified by HECC, implementation by universities

Proposal WS-3: Equity Achievement Act
Description: This proposal would provide targeted funding to support services, with the goal of scaling programs and increasing FTE.

Timeline for implementation: Minimum one year

Responsible entities: University leadership

Proposal WS-4: Single Point Entry and Engagement for Continuous Integrated Service Provision
Description: This proposal would develop a structure and process for post-secondary institutions to begin providing services and outreach to students at the high school level, to ensure a smooth transition and help students identify and leverage resources.

Timeline for implementation: 4-6 years

Responsible entities: Collaboration between ODE, HECC, and post-secondary institutions

Proposal WS-5: Effective Student Support and Wraparound Services Policy Priorities
Description: This proposal would create a block grant that universities could apply to specified programs of their choice, such as programs for first-generation and

underserved students, academic coaching, mentoring, career pathways, and ABE/GED/ESOL programs.

Timeline for implementation: 2-5 years to measure impact

Responsible entities: Post-secondary institutions

Proposal WS-6: College Access Sustainability and Growth
Description: This proposal would create an annual state investment in the Oregon TRIO Association of $500,000, which would represent a 10-20 percent increase in the number of TRIO grants in Oregon.

Timeline for implementation: Next biennium, 2023-2025

Responsible entities: Oregon TRIO Association and OSAC

Proposal WS-7: Oregon Guided Pathways
Description: This proposal would scale the implementation of Guided Pathways programs at Oregon community colleges, which have been in development since 2018.

Timeline for implementation: Minimum 10 years

Responsible entities: Community colleges with the assistance of the Oregon Student Success Center (OSSC)

Proposal WS-8: Corequisite Course Implementation at Oregon Community Colleges
Description: This proposal would expand corequisite course offerings currently under development at 11 community colleges and implement the system at the remaining six. Corequisite courses replace traditional remedial courses with parallel support and review sessions, with the goal of keeping students on track to earn credit for prerequisite math and English courses.

Timeline for implementation: Not specified; current corequisite courses have been in development for two years

Responsible entities: Community colleges with the coordination of the OSSC

Proposal WS-9: Disability Justice Action Plan for Oregon Higher Education
Description: This proposal would establish a Committee on Disability Justice in Higher Education. The committee, with staff support from the HECC, would be responsible for developing a statewide action plan and issuing policy recommendations for colleges and universities to improve access and support for students with disabilities.

Timeline for implementation: 1 year

Responsible entities: HECC

Proposal WS-10: Higher Education Excused Absence Act
Description: This proposal would require every public university to publish a university-wide excused absence policy that provides students with a baseline of excused absences for sickness, mental health issues, and other emergencies.

Timeline for implementation: 1 year

Responsible entities: Public universities, with reporting requirements to HECC

Findings and Recommendations Related to Systemic Accountability and Continuous Improvement

Note: For the numbered items below, Task Force Findings are in regular font, **followed by Recommendations in bold font.**

Below Findings and Recommendations are listed *Examples of related policies*, which are policy ideas submitted by work group participants or task force members.

1. The task force finds that since the dissolution of the Oregon University System and the establishment of university governing boards and the Higher Education Coordinating Commission, there have been questions about the state-level accountability of Oregon's systems of funding and coordination. While the Student Success and Completion funding model holds institutions accountable for investments in serving underrepresented students, its influence on institutional policies and outcomes is limited by the overall amount of funding it distributes to universities. **The task force recommends that policies enacted by the legislature focus on increasing clear communication of student outcomes, particularly for historically underserved populations and increase accountability at the local level along with increased investments in universities and students.**

Examples of related policies: SA-17, Campus Accountability Teams; SA-5, Build on HB 2864 Cultural Competency; SA-6, Accountability for Transition-to-work

2. The task force finds that higher education has historically been and persists today as an institution constructed to serve the dominant culture. As the demographics in Oregon continue to change, and students of color along with other underserved groups become a greater share of students at institutions, leadership, faculty, and staff must evolve to create new accessible systems that incorporate culturally responsive teaching and counseling to better serve the changing population. **The task force recommends that**

i**nstitutions must undertake hiring, training, and cultural competency practices that improve the ability of institutions and student-facing faculty and staff to interact with, diagnose the concerns of, and provide equitable opportunity in all aspects of institutional life to such students.**

Examples of related policies: SA-16, Cultural Competency Training for Advisers and Counselors; SA-11, Mandatory Ethnic Studies; SA-8, SA-5, SA-17, Comprehensive Orientation (10) Permanent Adult-In-Custody Committee

3. The task force acknowledges the hard work that institutional personnel are currently doing, and finds that students, faculty, and staff reported a lack of diverse educators and staff. The task force further finds that the extra work asked of diverse educators and staff creates campus environments that may lead to high rates of burnout and turnover. **The task force recommends that public higher education institutions renew their focus on recruiting diverse educators and staff and compensating them for labor that is currently unpaid.**

Examples of related policies: SA-3, Learning Journeys/Family Support

4. The task force finds that Oregon has an ongoing educational equity crisis, and this crisis continues to perpetuate systemic barriers and bias that create climate issues on campus where students do not feel supported or feel that they do not belong. Institutions of higher education are unique environments that represent an opportunity for Oregon to employ a systematic approach to operationalizing equity commitments. This operationalization should address leadership and faculty continuous professional development on diversity, equity, and inclusion issues and managing transformational change, access and enrollment, academic policies and practices, and student supports and belonging. **The task force recommends that a state committee focused on the development of equity in practice should be established to examine the question of what collaborative accountability with the state can look like in support of authentic implementation of an equity-minded system on campuses, to serve as a forum to highlight and disseminate the best of equity practices around the state, and to further advise the legislature when statutory or funding modifications would result in tangible positive impacts.**

Examples of Related policies: SA-7, Equity-minded Data Collection; SA-4, Metrics for Higher Education Accountability

5. The task force finds that students, faculty, and staff are concerned that people of color are employed as adjunct faculty at a higher rate, leading to functionally discriminatory rates of pay. Further, the task force heard that low pay and a lack of job security for adjunct faculty and some staff lead to high rates of turnover. **The task force recommends that public institutions of higher education study the disproportionate impact of the use of adjunct faculty, particularly the lack of pay**

parity between adjunct and tenured faculty.

Examples of related policies: SA-7, Equity-minded Data Collection; SA-4, Metrics for Higher Education Accountability

6. The task force finds that chief diversity officers or directors help to ensure diversity, equity, inclusion, and justice (DEIJ) are prioritized and made core institutional values in university/college operations. They are typically asked to develop a comprehensive DEIJ strategy and plan for the university or college in efforts to operationalize the commitment to equity in the institution by leading in an equity-minded framework that would intentionally evaluate systems, identify barriers for students and staff, build consistent capacity of understanding to enhance and/or create culture and learning environments that are welcoming and allow students to thrive so that they can complete their work/career pathway. These efforts may fall short due to the hierarchal view that the work only happens in multi-cultural offices or due to the fact that this work is not prioritized as part of an institution's overall strategic plan. These DEIJ roles must move past compliance, and lead to ensure the perspective and inclusion of our underserved and marginalized students are represented in policy, practice, curriculum, budget, and overall leadership decisions that impact the students being served. Out of Oregon's 24 institutions of higher education, only 15 have designated DEIJ roles that are designated leadership roles as part of the executive cabinet of their institution. **The task force recommends that all 24 public institutions should have this leadership-level role, which should be sufficiently resourced to support institution wide equity activity.**

Related policies: SA-1, Permanent funding for DEIJ work; SA-5, Build on HB 2864 Cultural Competency

7. The task force finds that students, faculty, and staff do not understand how their institutions allocate resources for purposes of supporting underrepresented members of the campus community, including how institutional budgets are determined. **The task force recommends that public higher education institutions involve broader representation of the campus community in resource allocation processes and decision-making.**

Examples of related policies: SA-12, Student Fee Autonomy/Shared Governance; SA-13, Debt Collection Act; SA-14, Student Legal Services ()

Policy Proposals Submitted by Work Group Members. Members of the Systemic Accountability and Continuous Improvement work group submitted the following proposals:

Proposal SA-1: Permanent Staffing and Funding for Equity Positions

Description: This proposal would require permanent support positions at community colleges for students of color, LGBTQSIA+ students, student veterans, first-generation, and low-income students.

Timeline for implementation: 18 months

Responsible entities: Community colleges, with state funding

Impact on existing law or programs: Not specified

Background: Current law requires higher education institutions to have benefit navigator positions on campus to assist students with accessing public benefits. This proposal would extend that model to include a variety of support positions.

Proposal SA-2: Scaling Student Success Programs Toward Institutional Change
Description: This proposal would increase funding for proven support programs such as TRIO, Future Connect, and Educational Opportunities Program.

Timeline for implementation: 3-6 months

Responsible entities: Community colleges, presumably with state funding

Impact on existing law or programs: Increase funding for existing programs

Proposal SA-3: Learning Journeys – Critical Partners and Pipelines for Safe, Inclusive, and Resilient Communities
Description: This submission envisions campus communities as familial environments, greater recruitment and retention rates for staff of color. The submitter proposes:

- Funding and support for campus child care
- Creation of paid internship opportunities for underrepresented students

Timeline for implementation: Not specified

Responsible entities: Institutional leaders

Impact on existing law or programs: HB 2864

Proposal SA-4: Requirement of Metrics for Higher Education
Description: This proposal would require institutions to capture measurable data to address specific opportunities for improvement.

Timeline for implementation: Beginning July 1, 2023

Responsible entities: Institutions, high schools, possibly HECC

Impact on existing law or programs: Not specified

Background: In 2011, Oregon decentralized control of its higher education system, opting instead for local control at the institutional level. While the Higher Education Coordinating Commission collects and publishes some performance data at the institutional level, this proposal would expand that data collection and require its use in addressing institutional improvement efforts.

Proposal SA-5: Build on Institutional Cultural Competency Approaches by Supporting Approaches Such as Targeted Universalism
Description: This proposal would provide support to institutions for setting universal goals built on the requirements of HB 2864.

Timeline for implementation: Fall 2023

Responsible entities: Institutions, with state funding

Impact on existing law or programs: Expansion of existing work under HB 2864

Background: In 2017, the Oregon Legislative Assembly enacted House Bill 2864, requiring each higher education institution to establish a process to enact cultural competency standards for the institution and its employees. The measure required training for employees, the creation of institution-wide goals, and a biennial report.

Proposal SA-6: Higher Education Accountability for Transition-to-Work Success
Description: This proposal calls for funding to support underrepresented students in internships, career preparation, and transitioning to work.

Timeline for implementation: 2023-2025 biennium

Responsible entities: HECC-distributed block grants to institutions

Impact on existing law or programs: Not specified

Background: While existing programs such as TRIO and other institutional efforts support students through degree attainment, this proposal would strengthen efforts to support students as they move from college into careers. Throughout its site visits, the task force heard from students who sought more assistance moving into careers.

Proposal SA-7: Strengthening Equity-Minded Data Capacity of Higher Education Institutions

Description: This proposal would provide support to institutions for data analysts and data infrastructure at institutions to strengthen data collection and analysis.

Timeline for implementation: 1-3 academic years

Responsible entities: Institutions, with state funding

Impact on existing law or programs: Not specified

Background: In 2011, Oregon decentralized control of its higher education system, opting instead for local control at the institutional level. While the Higher Education Coordinating Commission collects and publishes some performance data at the institutional level, this proposal would expand the collection and use of data in local decision making.

Proposal SA-8: Establishment of a Permanent Committee for Post-Secondary Education for Adults in Custody (AIC)

Description: This proposal recommends establishment of a permanent coordinating body comprising the Department of Corrections (DOC), Oregon Coalition for Higher Education in Prison (OCHEP), and HECC to manage prison-based higher education programs.

Timeline for implementation: 1 year to create committee; 2 years to create shared coordination strategy; 2+ years for implementing minimum statewide standards for prison-based higher education courses; 5+ years to measure enrollment, outcomes, and trends.

Responsible entities: HECC, DOC, OCHEP, current and former AICs, and AIC providers.

Impact on existing law or programs: Existing programs in DOC, HECC, OCHEP, and provider institutions would be impacted as coordination and standards are aligned.

Background: Oregon law requires the Department of Corrections (DOC) to provide an education system within each correctional institution for adults in custody. The stated objective of this education system is twofold: To implement a basic skills development program which assesses each adult's academic and intellectual competency, and to provide adults in custody with professional and occupational skills to prepare them for jobs post-release. DOC offers several educational programs to adults in custody, including preparation for the General Education Development (GED) high school equivalency test, English as a Second Language (ESL) courses, community college courses, and special education programs for adults in custody with disabilities.

Proposal SA-9: Expanding Eligibility for the Oregon Promise Grant

Description: This proposal would eliminate the requirement that Oregon Promise recipients be recent high school graduates.

Timeline for implementation: Dependent on funding

Responsible entities: HECC and Oregon Student Aid

Impact on existing law or programs: Oregon Promise Grant

Background: The Oregon Promise program was created by Senate Bill 81 (2015) and is the state's second-largest, state-funded financial aid program. Oregon Promise is a grant available to Oregon high school graduates or students who pass the General Educational Development (GED) test, subject to certain eligibility requirements, to provide financial assistance for tuition and fees at Oregon community colleges. Although the Oregon Promise is not a means-tested aid program, when sufficient funds are unavailable, Oregon law allows the Higher Education Coordinating Commission (HECC) to deny eligibility to students whose expected family contribution (EFC) is above a certain threshold as determined by the HECC by rule.

Proposal SA-10: Comprehensive Orientation for All Oregon Students
Description: This proposal would standardize and impose minimum standards for new student orientations, such as requiring specific content and requiring translation in Spanish for orientation events.

Timeline for implementation: 1 year

Responsible entities: Higher education institutions

Impact on existing law or programs: Submitters unsure

Background: Currently, state law is silent on orientation programs at Oregon's institutions of higher education. Each institution controls orientation at the local level. This proposal would impose minimum standards on all public higher education institutions in Oregon.

Proposal SA-11: Ethnic Studies Requirements at Oregon Higher Education Institutions
Description: This proposal would require all students to take a required course in ethnic studies in order to receive an undergraduate degree.

Timeline for implementation: Not specified

Responsible entities: HECC and institutions

Impact on existing law or programs: Ethnic studies departments, courses, and instructors will see increased demand.

Background: In response to passage of House Bill 3308 in 2015, HECC convened a work group to address disparities in higher education through continuing education. The work group surveyed students, who identified creation of ethnic studies departments at all public institutions of higher education as a key recommendation.

Proposal SA-12: HECC Statewide Task Force on Student Fee Autonomy and Shared Governance
Description: This proposal would create a task force convened by HECC with members drawn from student leadership to study issues that have arisen around student fee autonomy, including statutory requirements and timelines.

Timeline for implementation: 1-2 years

Responsible entities: HECC

Impact on existing law or programs: Existing statutes regarding student fee autonomy

Background: Students at Oregon's public universities and community colleges are subject to mandatory enrollment, incidental, and student-initiated fees in addition to tuition. These fees typically cover student involvement activities and programs. Mandatory incidental and student-initiated fees differ from mandatory enrollment fees in that they are requested by student governments and collected by institutional boards and are not subject to the same advisory guidelines as mandatory enrollment fees. Oregon law allows institutional boards or presidents to reject requests for incidental and student-initiated fees for a variety of reasons, including if the fee increase is greater than five percent and if the fee request is determined to not be advantageous to the cultural or physical development of students.

Proposal SA-13: Educational Debt Collection Practices Act
Description: This proposal would prohibit institutions from withholding transcripts or barring registration as a debt collection measure.

Timeline for implementation: 2024-2025 school year

Responsible entities: Institutions for implementation; HECC for oversight

Impact on existing law or programs: Not specified*
*Staff note: this proposal may have an impact on institutional revenue streams

Background: According to news reports, eight states have prohibited or restricted the use of transcript holds as debt collection measures: California, Colorado, Illinois, Maine,

Minnesota, New York, Ohio, and Washington. However, institutions in these states may still bar students from registering for classes if they owe money.

Proposal SA-14: Strengthening Student Legal Services for Oregon Students
Description: This proposal would require institutions to allow for broader use of free legal support services for students, to include disputes involving the university itself.

Timeline for implementation: A few years

Responsible entities: Student governments, universities, HECC

Impact on existing law or programs: Student fee autonomy, existing legal services programs

Proposal SA-15: Centralized Statewide Student Resources Portal
Description: This proposal would create and centralize a student resources portal in the form of a website, app, or virtual center. The portal would allow for easier access to existing resources that students may not be aware of.

Timeline for implementation: A few years

Responsible entities: HECC

Impact on existing law or programs: Not specified

Proposal SA-16: Cultural Competency for Academic Advisors and Mental Health Counselors
Description: This proposal would require higher education institutions to create and implement a plan for diversifying their advising and counseling workforces. Additionally, the proposal would mandate cultural competency training for academic advisors and mental health counselors.

Timeline for implementation: A few years

Responsible entities: Institutions, with support from HECC

Impact on existing law or programs: Existing advising and counseling programs

Background: In 2017, the Oregon Legislative Assembly enacted House Bill 2864, requiring each higher education institution to establish a process to enact cultural competency standards for the institution and its employees. The measure required training for employees, the creation of institution-wide goals, and a biennial report.

Proposal SA-17: Campus Accountability Teams

Description: This proposal would require the creation of Campus Accountability Teams on each campus. The Teams could be existing bodies designated to serve this function. Each team would review campus' efforts to improve the cultural inclusion climate for diverse students, faculty, staff, and administrators. Teams would be responsible for drafting formal responses or appraisals of campus efforts, and campus leaders would be required to respond with timelines addressing the concerns and recommendations of the team. Each team would be required to present its report to its respective institutional governing board, annually. The process would be overseen by HECC, which would periodically convene teams from multiple campuses to assess the process.

Timeline for implementation: Ongoing

Responsible entities: Legislature, students, institutional leaders, institutional boards, faculty, staff, accountability team members, members of related institutional committees or work groups.

Impact on existing law or programs: HB 2864

APPENDICES

Appendix A: Task Force Work Plan

HB 2590 – Joint Task Force on Student Success for Underrepresented Students in Higher Education

2022 Work Plan

The Joint Task Force on Student Success for Underrepresented Students in Higher Education (JTUSHE, also called the "Student Voice Task Force") is charged with visiting public university and community college campuses across the state to meet with students from underrepresented backgrounds so as to develop strategies and policies for promoting student success for students from such backgrounds. So far, the task force has convened for three virtual meetings, during which agency experts gave presentations that outlined the background on current conditions and inequitable outcomes for students from underrepresented and diverse backgrounds in Oregon's public higher education system. During these meetings, the task force also heard testimony from students who offered perspectives on their lived experiences. In addition to these public meetings, the chair of the task force, Rep. Alonso Leon, convened a work group of stakeholders to offer feedback on the task force's objectives and strategy for conducting site visits to meet with students. The planning group has met twice thus far in January of 2022.

The task force currently plans to hold five regionally focused site visits beginning in late March of 2022 and going into the summer. Each site visit will be at least two days, during which the task force will visit a university on one day and a community college the next. The itinerary for each site visit will be standard, beginning with roundtable discussions with stakeholders each morning, followed by small-group listening sessions with students, on-campus site tours in the afternoon, and a public hearing in the evening. The format for these site visits is based on those of the Joint Committee on Student Success in 2018-2019. The task force will also continue to hold public meetings focused on topics related to the task force's charge, during which local and national experts on equity issues in higher education will give presentations to guide the task force's work.

The task force's site visit calendar is constrained by the 2022 legislative session as well as the academic calendar, which includes spring break in mid-March and the end of the

academic year in mid-June. The task force plans to make the most of this condensed timeline while accommodating staff capabilities and legislators' availability.

Meeting Schedule

Date	Description	Objective	Possible Conflicts	Details
Past Meetings				
November 11, 2021	Virtual meeting	Elect chair, review task force charge, DEI orientation		Organizational meeting, introductions, review of task force charge, presentation by HECC on equity lens
December 16, 2021	Virtual meeting	Finish DEI orientation, discuss communications and outreach strategy		Part 2 of HECC equity lens presentation; HMO presentation on communications plan
January 4, 2022	Virtual planning meeting	1st meeting of planning group to develop strategy for task force		Gathering of representatives from CBOs, agencies, universities, community colleges, and other stakeholders to strategize
January 10, 2022	Virtual meeting	Update on planning group meeting; Oregon's economic and workforce needs presentation		Update from planning group, presentation from Office of Economic Analysis
January 25, 2022	Virtual planning meeting	2nd meeting of planning group to develop strategy for task force		Review discussion from previous meeting, finalize recommendations to task force
February 2022	NO MEETINGS – Short session		2022 Legislative Session	

Date	Description	Objective	Possible Conflicts	Details
March 30-31, 2022	Site visit	First campus site visit to Portland Metro area	Finals; spring break; post-session break	3/30: Visit PSU with participation invited from PCC, OHSU, and OIT. 3/31: Visit MHCC with participation from Clackamas CC and PCC
Past Meetings				
April 21, 2022	Virtual meeting	Topic: Access and Admissions		Presentations and discussion on barriers to admission and access to higher ed
April 25-26, 2022	Site visit	Second campus site visit to Willamette Valley area		4/25: Visit Lane CC with participation from UO 4/26: Visit WOU on 4/26 with participation from OSU, LBCC, Chemeketa CC, and OCCC
May 10-11, 2022	Site visit	Third campus site visit to Eastern Oregon area	HECC meeting on 5/12	5/10: Visit EOU 5/11: Visit TVCC on 5/11 with participation from Columbia Gorge CC and Blue Mountain CC
May 19, 2022	Virtual meeting	Topic: Financial Aid and Affordability		Presentations and discussion on affordability, financial aid, scholarships, family contributions, etc.
May 31, 2022	Virtual site visit	Virtual site visit for Central Oregon campuses	Leg. Days 5/31-6/2; OIT board meeting on 6/2	One-day itinerary for OSU Cascades, COCC, OIT, and KCC

Date	Description	Objective	Possible Conflicts	Details
June 16, 2022	Virtual meeting	Topic: Retention	Finals, end of academic year	Discussion of culturally responsive support services, hiring and retention of faculty of color, housing and food insecurity, child care, health care, and mental health and counseling services
July 14, 2022	Virtual meeting	Topic: Graduation and Workforce Participation	Summer vacation	Discussion of graduation timelines, career counseling, internships, job and career placement, relevance of degree to career paths
Past Meetings				
July 20-21, 2022	Site visit	Fifth site visit to Southern Oregon area	Summer vacation	7/20: Visit SOU 7/21: Visit RCC
August-September 2022	Work group meetings	Policy development conversations		Topic-oriented subcommittees will meet bi-weekly to develop policy responses based on conversations and site visits Group 1: Affordability and financial aid Group 2: Student support and wraparound services Group 3: Systemic accountability and continuous improvement

Date	Description	Objective	Possible Conflicts	Details
Week of September 5, 2022	Work group meetings 1	Reflect on site visits; share and discuss policy proposals		
Planned Meetings				
September 20, 2022	Work group meetings 2	Share and discuss policy proposals		Task Force Day during September Legislative Days
September 23, 2022	LC Request Deadline	LC draft request deadline (submit placeholders).		Staff will submit one or more placeholder LC requests based on topics related to each of the sub-groups.
Week of October 3	Work group meetings 3	Vetting of policy proposals		
Week of October 17	Work group meetings 4	Vetting of policy proposals		
Week of October 31	Work group meetings 5	Finalize policy recommendations to task force		
November 17, 2022	Convene full task force	Hear policy proposals from each work group		Each of the work group co-chairs will present the policy proposals that emerged from their groups to the full task force.
November-December 2022	Report drafting			Staff will draft a report that describes the meetings and recommendations of the task force.
December 5, 2022	LC drafts returned			Drafts of legislative concepts will be returned by this date.

Date	Description	Objective	Possible Conflicts	Details
December 6, 2022	Task Force Day for Legislative Days	Approve final report, vote to introduce placeholders for 2023 session		The task force will hold a work session for final approval of the report and policy proposals contained therein.
December 15, 2022	Final report due	Submit report per sec. 1(13) of HB 2590		
December 21, 2022	Presession filing deadline			Deadline to file legislation to be introduced in 2023 session.

Daily Agenda for Site Visits

8:00-11:45 – Stakeholder Roundtables

8:00-9:45 – Session 1: Community and Institutional Leaders and CBOs

- Local business and industry groups (4-5 people)
- School district representatives: superintendent and board chair (2 people)
- Institutional governing board: one or two board members (2 people from each board)
- University/College President(s)
- Student government leader(s)
- Community-based organizations that work with HS or college/university students

9:45-10:00 – Break

10:00-11:45 – Session 2: Faculty & Staff

- Faculty, including:
  - Adjunct faculty
  - Tenured faculty
  - Part-time faculty
  - Graduate student faculty
- Classified staff, including:
  - Facilities staff
  - Nutrition staff
  - Transportation staff
  - Housing staff
- Student support staff, including:

- Mental health practitioners
- Disability services staff
- Financial aid officers
- Admissions officers
- Academic advisors, academic coachers, tutors
- TRIO Student Support Services program staff
- Multicultural support centers
- Basic needs navigators
- Military veteran support center staff
- DEI officers

11:45-1:30 – Lunch

1:30-3:30 – Student Roundtables
Student-led discussions at tables with 4-5 students and 2 legislators each. Members will rotate through each table after 15 minutes. Students will be selected and invited by university or college administration, and will come from various underrepresented backgrounds, including:

- Students of color;
- Former foster students;
- Veterans;
- Students from rural communities;
- LGBTQ2IA+ students;
- Students who are enrolled tribal members;
- Adult students and students with children;
- Alumni from underrepresented backgrounds;
- Pell recipients and first-generation students;
- Students with disabilities; and
- High school equivalency

Participants to be selected and invited by university administration.

4:00-5:00 – Site Tours
Visits to unique facilities on campus that may model support services to assist underrepresented students with academic success (e.g., TRIO programs, student cultural centers, etc.)
Sites to be selected by Rep TAL from list of suggestions submitted.

5:30-7:00 – Public Comment
The task force will receive public comment from students, CBOs, and other stakeholders.

PROPOSED SUB-GROUP MEETING PLAN

Topic-specific work groups will meet every two weeks between August and November to review the themes that emerged during the site visits and investigate policy proposals to address the issues discussed. Each group will compile its recommended policy proposals into a numbered list and present the proposals to a full meeting of the task force in November for formal approval.

Group 1: Affordability and financial aid
Charge: Review and discuss methods to address budgetary and affordability challenges faced by students, including:

- state financial aid programs;
- access to public benefits, such as provided in HB 2835 (2021); and
- the cost of attendance beyond tuition and fees, including housing, food, child care, etc.

Group 2: Student support and wraparound services
Charge: Review and discuss the programmatic elements of serving underrepresented students on campuses, including:

- best practices from elsewhere in the country;
- academic support services; and
- wraparound services, including but not limited to counseling, mentoring, advising, culturally specific services, etc.

Group 3: Systemic accountability and continuous improvement
Charge: Review and discuss the non-programmatic elements of serving underrepresented students, including:

- the “hidden curriculum” of navigating the higher education system;
- culture and climate on campuses;
- cultural competency policies, such as those required by HB 2864 (2017); and
- methods of promoting continuous improvement and institutional transparency at the state level.

Proposed schedule of sub-group meeting process

Date	Description	Objective	Possible Conflicts	Details
August-September 2022	Work group meetings	Policy development conversations		Topic-oriented subcommittees will meet bi-weekly to develop policy responses based on conversations and site visits Group 1: Affordability and financial aid Group 2: Student support and wraparound services Group 3: Systemic accountability and continuous improvement
Week of September 5, 2022	Work group meetings 1	Reflect on site visits; share and discuss policy proposals		
September 20, 2022	Work group meetings 2	Share and discuss policy proposals		Task Force Day during September Legislative Days
September 23, 2022	LC Request Deadline	LC draft request deadline (submit placeholders).		Staff will submit one or more placeholder LC requests based on topics related to each of the sub-groups.
Week of October 3	Work group meetings 3	Vetting of policy proposals		
Week of October 17	Work group meetings 4	Vetting of policy proposals		
Week of October 31	Work group meetings 5	Finalize policy recommendations to task force		

November 17, 2022	Convene full task force	Hear policy proposals from each work group		Each of the work group co-chairs will present the policy proposals that emerged from their groups to the full task force.

Appendix B: Site Visit Documents

Portland Metro Area: March 30-31, 2022.

Detailed Agendas

DETAILED AGENDA: SITE VISIT TO PORTLAND AND GRESHAM MARCH 30-31, 2022

March 30, 2022
Host Institution: Portland State University

Time	Event	Location	Parking
8:00 AM – 9:30 AM	Roundtable with Community Leaders	Smith Memorial Student Union Room 338 (Vanport Room) 1825 SW Broadway Portland, OR 97201	Parking Structure One 1872 SW Broadway or Parking Structure 2 1724 SW Broadway
9:45 AM – 11:15 AM	Roundtable with Faculty and Staff	Smith Memorial Student Union Room 338 (Vanport Room) 1825 SW Broadway Portland, OR 97201	Parking Structure One 1872 SW Broadway or Parking Structure 2 1724 SW Broadway
12:45 PM – 2:45 PM	Student Listening Session	Smith Memorial Student Union Room 296 1825 SW Broadway Portland, OR 97201	Parking Structure One 1872 SW Broadway or Parking Structure 2 1724 SW Broadway
3:00 PM – 4:30 PM	Site Tours	Various	
5:00 PM – 7:00 PM	Public Comment Period	Smith Memorial Student Union Ballroom 355 1825 SW Broadway Portland, OR 97201	Parking Structure One 1872 SW Broadway or Parking Structure 2 1724 SW Broadway

PARKING

SMSU

March 31, 2022
Host Institution: Mount Hood Community College

Time	Event	Location	Parking
8:00 AM – 9:30 AM	Roundtable with Community Leaders	Room AC 2000 Bldg 10 NE Kane Rd & NE 29th St. Gresham, OR 97030	Lots A or B
9:45 AM – 11:15 AM	Roundtable with Faculty and Staff	Room AC 2000 Bldg 10 NE Kane Rd & NE 29th St. Gresham, OR 97030	Lots A or B
12:45 PM – 2:45 PM	Student Listening Session	Town & Gown Room AC 2057 Bldg 10 NE Kane Rd & NE 29th St Gresham, OR 97030	Lots A or B
3:00 PM – 4:30 PM	Site Tours	Various	
5:00 PM – 7:00 PM	Public Comment Period	College Theater Room AC 2147 Bldg 11 NE Kane Rd & NE 29th St Gresham, OR 97030	Lots C or D

GRESHAM CAMPUS SITE MAP
MT. HOOD COMMUNITY COLLEGE
Campus Buildings
Building Numbers
Parking Lots
Roads & Walkways
A-G Campus Entrances
CAMPUS INFORMATION: 503-491-6422 • PUBLIC SAFETY: 503-491-7310
N.E. 17th St.
Stark St.
Kane Rd./257th
29th St.
ENTRANCE
EXIT
Oslund Field Baseball Diamond
Earl L. Klapstein Stadium
Softball Field
Aquatic Center
Outdoor Pool
Tennis Courts
MHCC Pond
G.E. Building Annex
Yoshida Event Center
Health and Physical Education / Gym
Visual Arts
Visual Arts Theatre
Visual Arts Gallery
2350 President's Office
Town and Gown
Vista Dining Center
College Theater
Applied Technologies
Early Childhood Center
Head Start
Fisheries
MOD 1
MOD 2
Bus Entrance

Portland Metro Area: March 30-31, 2022.

Meeting Summaries

Joint Task Force on Student Success for Underrepresented Students in Higher Education

Meeting Summary – Portland Field Trips
March 30, 2022

Community Leaders Roundtable
Vanport Room, Room 338, Smith Memorial Student Union
1825 SW Broadway
Portland, OR 97201

Members Present**:** Rep. Alonso Leon, Chair; Rep. Ruiz; Sen. Dembrow; Sen. Wagner; Sen. Frederick
Members Excused**:** Rep. Owens; Rep. Zika; Sen. Findley; Sen. Robinson
Non-Member legislators present: None
The task force met with a group of higher education stakeholders in a roundtable format. Participating stakeholders included representatives of Portland State University, Oregon Health & Science University, Oregon Institute of Technology, and Portland Community College, in addition to Portland Public Schools, student groups, local business leaders, and community-based organizations. Representative Teresa Alonso Leon, Chair, welcomed the group and prompted discussion by asking what could be done to promote better outcomes for underrepresented students. Discussion points included the importance of creating a sense of belonging for students, mentoring and summer programs for first-generation students, difficulties faced by students in meeting their basic needs, the diversity of faculty and staff on campus, the role of higher education institutions in providing wraparound services,; students' difficulties in navigating financial aid and transfer applications, services and programs for adults with low literacy and numeracy, eligibility requirements for students to access public benefits, and the share of state financial resources allocated to higher education.

Faculty and Staff Roundtable

Vanport Room, Room 338, Smith Memorial Student Union
1825 SW Broadway
Portland, OR 97201
Members Present: Rep. Alonso Leon, Chair; Rep. Ruiz; Sen. Dembrow; Sen. Wagner; Sen. Frederick
Members Excused: Rep. Owens; Rep. Zika; Sen. Findley; Sen. Robinson
Non-member legislators present: None
The task force met with faculty and staff from Portland State University, Oregon Health and Science University, Portland Community College, and the Oregon Institute of Technology. Representative Teresa Alonso Leon, Chair, welcomed the group with opening remarks and asked

participants how to support students. Discussion focused on supports both in and out of the classroom, the role of technology in higher education, educator diversity, educator compensation and parity, the need for partnerships, the need to lower or eliminate tuition, the role of high schools in assisting students with access to higher education, pathway programs, food and housing security, transitions, mental health supports, the use of data to identify students in need of support, the need to destigmatize supports, career readiness and advising, the nature of the problems facing students and institutions, students' financial literacy or lack thereof, the need for need-based aid, flexibility for students, the need for clearer data, and the need for underrepresented students to feel a sense of belonging in higher education.

Student Listening Session
Room 296, Smith Memorial Student Union
1825 SW Broadway
Portland, OR 97201
Members Present: Rep. Alonso Leon, Chair; Rep. Ruiz; Sen. Dembrow; Sen. Wagner
Members Excused: Rep. Owens; Rep. Zika; Sen. Findley; Sen. Robinson; Sen. Frederick
Other legislators present: None
Approximately 25 students from Portland State University and Oregon Health & Science University attended the listening session. Each of the attending task force members sat at tables with groups of four or five students. The students described their educational experiences and responded to questions from the task force members. Approximately every 30 minutes, the task force members rotated to new tables to talk with each group of students.

Site Tour
Multicultural Center, Room 228, Smith Memorial Student Union
1825 SW Broadway
Portland, OR 97201

Members Present: Rep. Alonso Leon, Chair; Rep. Ruiz; Sen. Dembrow; Sen. Wagner
Members Excused: Rep. Owens; Rep. Zika; Sen. Findley; Sen. Robinson; Sen. Frederick
Other legislators present: None
Task force members toured several facilities on the Portland State University (PSU) campus. The tour began at the Multicultural Center in Smith Memorial Student Union. Members learned about the student support services provided at the Multicultural Center, the Basic Needs Hub, and various student resource centers that serve specialized populations. The tour continued to the Transfer & Returning Student Resource Center in Fariborz Maseeh Hall, where the task force members learned about the services offered to students who transfer to PSU, who comprise a majority of the student body. The tour then led to Lincoln Hall, where members observed a music class in progress and spoke to the students about the task force's purpose. The tour concluded with a visit to Portland Community College's (PCC) dental clinic located at the Vanport Building (1810 SW 5th Ave), where the task force members learned about workforce preparation and career prospects for graduates of the dental assistant and dental hygiene programs.

Joint Task Force on Student Success for Underrepresented Students in Higher Education

Meeting Summary – Gresham Field Trips
March 31, 2022

Community Leaders Roundtable
Vista Dining Center, Room AC 2000, Building 10
Mt. Hood Community College
26000 SE Stark St.
Gresham, OR 97030

Members Present: Rep. Alonso Leon, Chair; Sen. Dembrow; Sen. Wagner; Sen. Frederick
Members Excused: Rep. Owens; Rep. Ruiz; Rep. Zika; Sen. Findley; Sen. Robinson
Non-Member legislators present: None
The task force convened at 8:00 AM for a roundtable discussion with education and community leaders. The group included presidents, board chairs, board members, and student government leaders from Mt. Hood Community College, Portland Community College, and Clackamas Community College, as well as the superintendent and board chair of Gresham-Barlow School District, business and industry leaders, and representatives from community-based organizations that serve students in higher education. Rep. Alonso Leon, Chair, began the discussion by asking the participants what student success would look like to them. Discussion points touched on the impact of the COVID-19 pandemic on students, non-metric indicators of success, working toward better alignment of the K-12 and higher education systems, guided pathways for students, affordability and perceptions of the cost of higher education, wraparound services for first-generation students, the value of teaching financial literacy, the complexity of financial aid applications, caseloads for benefits navigators, state funding for higher education, the state's 40-40-20 goals, and enrollment challenges faced by community colleges in the current economic environment.

Faculty and Staff Roundtable

Vista Dining Center, Room AC 2000, Building 10
Mt. Hood Community College
26000 SE Stark St.
Gresham, OR 97030

Members Present: Rep Alonso Leon, Sen. Dembrow, Sen. Wagner, Sen. Frederick
Members Excused: Rep Owens, Rep Ruiz, Rep Zika, Sen. Findley, Sen. Robinson
Non-member legislators present:

The task force met with faculty and staff at 9:45 AM. Representative Alonso Leon welcomed the task force and participants, and task force members introduced themselves. Representative Alonso Leon asked the participants to discuss what steps the legislature could take to better support underrepresented stu, dents in higher education. Among the topics discussed were the needs of students receiving financial aid; the need for diverse mentors; the extra work being asked of diverse educators; the need for additional funding; free or reduced tuition; the need for diverse educators; the basic needs of students (housing, food, child care, transportation); staff shortages; adjunct pay and job security; wraparound services for students; institutional budgets and transparency; partnerships with community based organizations; the need to promote college-going among K-12 students; students who need help with financial aid paperwork; efforts to expand Oregon Promise; tutoring, non-credit courses and academic supports; broadband access and technical support for students; the inequities of a higher education system that requires tuition payments; systemic barriers; "Oregon goes to college;" collaborative space for research and innovation; access for students with disabilities; systematizing the state's community colleges; the need for diversity, equity, and inclusion staff on every campus; classified staff salary schedules; universal access; and the contribution of higher education to quality of life among Oregonians.

Student Listening Session
Town and Gown Room, Room AC 2057, Building 10
Mt. Hood Community College
26000 SE Stark St.
Gresham, OR 97030

Members Present: Rep. Alonso Leon, Chair; Rep. Ruiz; Sen. Dembrow; Sen. Wagner; Sen. Frederick
Members Excused: Rep. Owens; Rep. Zika; Sen. Findley; Sen. Robinson
Other legislators present: None
Approximately 20 students from Mt. Hood Community College, Portland Community College, and Clackamas Community College attended the listening session. Each of the attending task force members sat at tables with groups of five or six students. The students described their educational experiences and responded to questions from the task force members. Approximately every 40 minutes, the task force members rotated to new tables to talk with each group of students.

Site Tour
Applies Technologies Building
Mt. Hood Community College
26000 SE Stark St.
Gresham, OR 97030
Members Present: Rep. Alonso Leon, Chair; Rep. Ruiz; Sen. Dembrow; Sen. Wagner; Sen. Frederick

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Members Excused: Rep. Owens; Rep. Zika; Sen. Findley; Sen. Robinson
Other legislators present: None
Members began a tour of the Mt. Hood Community College campus at the Applied Technologies building. There, they learned about the college's Career Pathways programs, including welding, machining, and automotive repair, which attract a large number of English language learners. The tour continued to the Adult Basic Skills Resource Center, which serves speakers of more than 75 languages and provides adult basic skills education and high school equivalency degree programs. The members then viewed the forthcoming Equity Center, which is being constructed using funds from the federal Higher Education Emergency Relief Fund and will host the basic needs navigator, the food pantry, the student government, and the Multicultural & Diversity Resource Center. The tour concluded at the current Multicultural & Diversity Resource Center located in the Student Union and learned of its history and current utilization rates since the start of the COVID-19 pandemic.

Willamette Valley: April 25-26, 2022.

Detailed Agendas

DETAILED AGENDA: SITE VISIT TO EUGENE AND MONMOUTH
APRIL 25-26, 2022

April 25, 2022
Host Institution: Lane Community College & University of Oregon

Time	Event	Location	Parking
8:00 AM – 9:30 AM	Roundtable with Community Leaders	Lane Community College Main Campus, Building 19, Rooms 102, 103 & 104, 4000 E 30th Ave, Eugene, OR 97405	Lot D or E
9:45 AM – 11:15 AM	Roundtable with Faculty and Staff	Lane Community College Main Campus, Building 19, Rooms 102, 103 & 104, 4000 E 30th Ave, Eugene, OR 97405	Lot D or E
12:45 PM – 2:45 PM	Student Listening Session	University of Oregon, Lyllye Reynolds-Parker Black Cultural Center, 1870 E 15th Ave, Eugene, OR 97403	B-East Lots
3:00 PM – 4:30 PM	Site Tours	University of Oregon, Erb Memorial Union, 1395 University St, Eugene, OR 97403	B-East Lots
5:00 PM – 7:00 PM	Public Comment Period	University of Oregon, Erb Memorial Union, Room 214 (Redwood Auditorium), 1395 University St, Eugene, OR 97403	B-East Lots

April 26, 2022
Host Institution: Western Oregon University

Time	Event	Location	Parking
8:00 AM – 9:30 AM	Roundtable with Community Leaders	Western Oregon University, Werner University Center, Columbia Room (lower level), 345 Monmouth Ave. N., Monmouth OR 97361	Lot H
9:45 AM – 11:15 AM	Roundtable with Faculty and Staff	Western Oregon University, Werner University Center, Columbia Room (lower level), 345 Monmouth Ave. N., Monmouth OR 97361	Lot H
12:45 PM – 2:45 PM	Student Listening Session	Western Oregon University, Werner University Center, Willamette Room (upper level), 345 Monmouth Ave. N., Monmouth OR 97361	Lot H
3:00 PM – 4:30 PM	Site Tours	Various	Lot H
5:00 PM – 7:00 PM	Public Comment Period	Western Oregon University, Werner University Center, Columbia Room, 345 Monmouth Ave. N., Monmouth OR 97361	Lot H

Willamette Valley: April 25-26, 2022.

Meeting Summaries

Joint Task Force on Student Success for Underrepresented Students in Higher Education

Meeting Summary – Eugene Field Trips
April 25, 2022

Community Leaders Roundtable

Lane Community College, Building 19, Room 102
4000 E. 30th Ave.
Eugene, OR 97405

Members Present**:** Rep. Alonso Leon, Chair; Rep. Ruiz; Sen. Dembrow; Sen. Wagner
Members Excused**:** Rep. Owens; Rep. Zika; Sen. Findley; Sen. Robinson; Sen. Frederick
Non-Member legislators present: None
The task force met at 8:00 AM at Lane Community College for a roundtable discussion with education and community leaders in the Eugene-Springfield area. The meeting included invited guests from a variety of backgrounds, including presidents, vice presidents, student government representatives, and current and former board members of Lane Community College and the University of Oregon; the superintendent and board chair of Eugene 4J School District; local business leaders; college access organizations; community-based organizations; local workforce boards; and the Oregon Department of Veterans' Affairs. Representative Alonso Leon, Chair, prompted discussion by asking what each stakeholder could to do ensure student success for underrepresented students. Discussion touched on a number of topics, including: identifying and students' mental health needs; the rising cost of living for students; high debt loads leading students to choose more lucrative career paths; rates of food insecurity among underrepresented groups; efforts to expand access to members of federally recognized tribes; the effects of mentoring before and during the college admission process; Oregon's college savings account program; identifying challenges faced by students at points of transition from early learning through higher education; reducing barriers to applying for higher education, such as separate applications and testing requirements; urging increased investments in state-funded financial aid programs; the importance of one-to-one personal relationships for students; integration with the K-12 public education system; debt loads for students who stop out before graduation; challenges in supporting students who are veterans; underutilization of financial aid; and the ratio of resident and non-resident students of color at Oregon's public universities.

Faculty and Staff Roundtable

Lane Community College, Building 19, Room 102
4000 E. 30th Ave.
Eugene, OR 97405

Members Present: Rep Alonso Leon, Chair; Rep Ruiz, Sen. Dembrow, Sen. Wagner
Members Excused: Rep. Owens, Rep. Zika, Sen. Findley, Sen. Robinson, Sen. Frederick
Non-member legislators present:
The task force came together at 10:15 AM at Lane Community College to meet with local faculty and staff of Lane Community College and the University of Oregon. The discussion addressed issues concerning counseling, student self-advocacy, resources and funding, staff needs, invisible labor, needs of rural students of color, intentional connections with high school students, retention of faculty and staff of color, students who arrive from impoverished backgrounds going deeper into poverty as a result of pursuing higher education, career and technical education, the higher costs associated with educating high-barrier populations, the importance of local institutional efforts, intersectional identities of students, existing programs, faculty assumptions, inflexibility of many academic programs, faculty training, needs of part-time faculty, students' basic needs, wraparound services, collaboration, Hispanic-serving institution status, financial aid, mentoring, affordability, full Pell plus full Oregon Opportunity Grant adding up to $11,000 per year, classified staff contract hours, and the needs of graduate student employees.

Student Listening Session

University of Oregon, Lyllye Reynolds-Parker Black Cultural Center
1870 E. 15th Ave.
Eugene, OR 97403
Members Present: Rep. Alonso Leon, Chair; Rep. Owens, Rep. Ruiz; Sen. Dembrow; Sen. Wagner
Members Excused: Rep. Zika; Sen. Findley; Sen. Robinson; Sen. Frederick
Other legislators present: None
Approximately 20 students from Lane Community College, Western Oregon University, and the University of Oregon attended the listening session. Task force members sat individually or paired at tables with groups of four or five students. The students described their educational experiences and responded to questions from the task force members. Task force members rotated tables approximately every 30 minutes to meet with each group of students.

Site Tour: University of Oregon

Black Cultural Center, Moss St Children's Center, Erb Memorial Union
Members Present: Rep. Alonso Leon, Chair; Rep. Owens, Rep. Ruiz, Sen. Dembrow, Sen. Wagner
Members Excused: Rep. Zika, Sen. Findley, Sen. Robinson, Sen. Frederick
Other legislators present:
Members were welcomed to the school for a tour. Taylor McHolm and Ella Meloy led a tour of the Black Cultural Center, the Moss St. Children's Center, and the Erb Memorial Union. The Black Cultural Center provides resources for the Black community on the University of Oregon campus. The Moss St Children's Center provides child care to the university community, and the Erb Memorial Union houses several centers to assist underrepresented students, including the

women's center, the veterans' center, the multi-cultural center, and the LGBTQSIA+ student union. Throughout the tour, task force members and tour guides discussed the needs of students and the services provided by the University.

Joint Task Force on Student Success for Underrepresented Students in Higher Education

Meeting Summary – Monmouth Field Trips
April 26, 2022

Community Leaders Roundtable

Western Oregon University, Werner University Center, Columbia Room
345 Monmouth Ave. N.
Monmouth, OR 97361

Members Present**:** Rep. Alonso Leon, Chair; Rep. Owens; Sen. Dembrow; Sen. Findley, Sen. Wagner
Members Excused**:** Rep. Ruiz; Rep. Zika; Sen. Robinson; Sen. Frederick
Non-Member legislators present: None
The task force met at 8:00 AM at Western Oregon University for a roundtable discussion with education and community leaders in the mid-Willamette Valley area. The meeting included invited guests from a variety of backgrounds, including: presidents, student government representatives, and current and former board members of Western Oregon University, Oregon State University, Chemeketa Community College, and Linn-Benton Community College; the superintendent of Central School District; and representatives of community-based and student advocacy organizations. Representative Alonso Leon, Chair, prompted discussion by asking what each stakeholder could do to ensure student success for underrepresented students. Discussion touched on a number of topics, including: the value of student support and mentoring programs such as TRIO; the importance of adopting trauma-informed approaches to student support; the need to diversify the higher education workforce to better reflect the demographics of the student body; improved alignment between the K-12 public education system and higher education, particularly at points of transition; strategies for maintaining student engagement and reducing absenteeism; the importance of sports lottery funding from the state; the balance of institutional budgets between tuition revenue and state appropriations; cultural disengagement from higher education in areas with high levels of poverty, particularly in rural areas; the cost of providing mental health and other wraparound services to students; the importance of training Oregonians to fill jobs created through economic development initiatives; state and federal funding for career-technical education (CTE) and work study programs; wages earned by students through work study and internships; the cost of institutional compliance with state mandates; and funding methods for student resource centers and other student supports.

Faculty and Staff Roundtable

Western Oregon University, Werner University Center, Columbia Room
345 Monmouth Ave. N.
Monmouth, OR 97361

Members Present: Rep Alonso Leon, Chair; Rep Owens, Sen. Dembrow, Sen. Findley, Sen. Wagner
Members Excused: Rep. Ruiz, Rep. Zika, Sen. Robinson, Sen. Frederick
Non-member legislators present:
The task force came together at 10:00 AM at Western Oregon University to meet with local faculty and staff. The discussion addressed issues concerning resources to support students, stable funding, student workers, students' basic needs, workers' basic needs, advising and mentoring support for students, student teachers, WOU's move toward Hispanic-serving institution status, bridge programs for incoming students, mental health supports, emotional labor, invisible labor, upper administration pay and purpose, audits of university budgets, documentation of disability requirements, accessibility for students with disabilities, sense of belonging for high-needs students, a proposal for a state-funded work study program similar to Colorado's, coordination of services, earlier information for students on financial aid awards, higher education as an ecosystem, the unique role of regional universities, need for evening and weekend classes, need for child care, faculty professional development, retention of underrepresented faculty, diversity scholarships, student family housing, and the importance of clubs and club sports.

Student Listening Session

Western Oregon University, Werner University Center, Willamette Room
345 Monmouth Ave. N.
Monmouth, OR 97361

Members Present: Rep. Alonso Leon, Chair; Rep. Owens; Sen. Dembrow; Sen. Findley; Sen. Wagner
Members Excused: Rep. Ruiz; Rep. Zika; Sen. Findley; Sen. Robinson; Sen. Frederick
Other legislators present: None
Approximately 25 students from Western Oregon University, Linn-Benton Community College, Oregon State University, and Chemeketa Community College attended the listening session. Task force members sat individually at tables with groups of four or five students. The students described their educational experiences and responded to questions from the task force members. Task force members rotated tables approximately every 25 minutes to meet with each group of students.

Site Tour of Western Oregon University

LOCATION(s): Weber University Center, Richard Woodcock Building, Academic Programs and Support Center
Members Present: Rep. Alonso Leon, Chair; Sen. Dembrow, Sen. Findley, Sen. Wagner
Members Excused: Rep. Owens, Rep. Ruiz, Rep. Zika, Sen. Robinson, Sen. Frederick
Other legislators present:

Members were welcomed to the school for a tour led by Dave McDonald, Caitlin Wheeler, Melissa Ontiveros, Aundrea Aldan, Blanca Jimenez, and Moshe Martinez. At the Werner University Center, the tour included the Multicultural Student Services and Programs (MSSP), the Non-Traditional Student Center, the Freedom Center, the Career Center, the Veterans' Center, and the Center for Equity and Gender Justice. At the Richard Woodcock Building, task force members learned about WOU's educator preparation program, its bilingual teacher scholars program, community health, and the need to make educator preparation practicums into work-study opportunities. At the Academic Programs and Support Center, task force members learned about the need for capital improvements on campus.

Eastern Oregon: May 10-11, 2022.

Detailed Agendas

DETAILED AGENDA: SITE VISIT TO LA GRANDE AND ONTARIO
MAY 10-11, 2022

May 10, 2022
Host Institution: Eastern Oregon University

Time	Event	Location	Parking
8:00 AM – 9:45 AM	Roundtable with Community Leaders	David E. Gilbert Event Center (adjacent to Ackerman Hall) 1 University Blvd, La Grande, OR 97850	Gilbert Lot (enter at 12th St. & I Ave.; show permit)
10:00 AM – 11:45 AM	Roundtable with Faculty and Staff	David E. Gilbert Event Center (adjacent to Ackerman Hall) 1 University Blvd, La Grande, OR 97850	Gilbert Lot (enter at 12th St. & I Ave.; show permit)
1:30 PM – 3:30 PM	Student Listening Session	David E. Gilbert Event Center (adjacent to Ackerman Hall) 1 University Blvd, La Grande, OR 97850	Gilbert Lot (enter at 12th St. & I Ave.; show permit)
4:00 PM – 5:00 PM	Site Tours	Various	Gilbert Lot (enter at 12th St. & I Ave.; show permit)
5:30 PM – 7:00 PM	Public Comment Period	Ackerman Hall, Room 210 8th St. & K Ave., La Grande, OR 97580	Gilbert Lot (enter at 12th St. & I Ave.; show permit)

May 11 2022
Host Institution: Treasure Valley Community College

Time	Event	Location	Parking
8:00 AM – 9:45 AM	Roundtable with Community Leaders	Building #4 (Weese Building), Room 110 650 College Blvd, Ontario, OR 97914	Main Parking Lot (enter on 5th Ave.; no permit)
10:00 AM – 11:45 AM	Roundtable with Faculty and Staff	Building #4 (Weese Building), Room 110 650 College Blvd, Ontario, OR 97914	Main Parking Lot (enter on 5th Ave.; no permit)
1:30 PM – 3:30 PM	Student Listening Session	Building #4 (Weese Building), Room 110 650 College Blvd, Ontario, OR 97914	Main Parking Lot (enter on 5th Ave.; no permit)
4:00 PM – 5:00 PM	Site Tours	Various	Main Parking Lot (enter on 5th Ave.; no permit)
5:30 PM – 7:00 PM	Public Comment Period	Four Rivers Cultural Center Performing Arts Center Theater, Building #2 676 SW 5th Ave, Ontario, OR 97914	Main Parking Lot (enter on 5th Ave.; no permit)

Eastern Oregon: May 10-11, 2022.

Meeting Summaries

Joint Task Force on Student Success for Underrepresented Students in Higher Education

Meeting Summary – La Grande Field Trips
May 10, 2022

Community Leaders Roundtable

Eastern Oregon University
David E. Gilbert Event Center
1 University Blvd, La Grande, OR 97850

Members Present**: Sen. Dembrow, Sen. Findley, Sen. Frederick (ex officio), Rep. Owens, Rep. Ruiz**

Members Excused**: Sen. Robinson, Sen. Wagner, Rep. Alonso Leon, Rep. Zika**

Non-Member legislators present: **None**

The task force convened at 8:15 AM at Eastern Oregon University (EOU) to meet with local education stakeholders. The meeting included invited members of the EOU Board of Trustees, EOU faculty and staff, Associated Students of EOU, College Possible, La Grande School District, Urban League of Portland, Shelter from the Storm, InterMountain Education Service District, and Eastern Oregon Workforce Board. The discussion addressed issues concerning supporting high school student transition to college, trades courses offered in high school, dual credits, college courses offered online, college affordability, stable and adequate funding, funding formula structure, increased outreach to parents and students about available financial aid resources, and financial aid structure and requirements.

Faculty and Staff Roundtable

Eastern Oregon University
David E. Gilbert Event Center
1 University Blvd, La Grande, OR 97850

Members Present: **Sen. Dembrow, Sen. Findley, Sen. Frederick (ex officio), Rep. Owens, Rep. Ruiz**

Members Excused: **Sen. Robinson, Sen. Wagner, Rep. Alonso Leon, Rep. Zika**

Non-member legislators present: **None**

The task force convened at 10:00 AM at Eastern Oregon University (EOU) to meet with EOU Faculty and Staff. The discussion addressed issues concerning financial aid requirements, college affordability, understaffing, increased student supports, supports for LGBTQ+ students, Spanish interpreters for community outreach, accessibility, staff diversity, accountability and transparency, and funding formula structure.

Student Listening Session

Eastern Oregon University
David E. Gilbert Event Center
1 University Blvd, La Grande, OR 97850

Members Present: Sen. Dembrow, Sen. Findley, Sen. Frederick, Rep. Owens, Rep. Ruiz

Members Excused: Sen. Robinson, Sen. Wagner, Rep. Alonso Leon, Rep. Zika

Other legislators present: None.

Fifteen students and alumni from Eastern Oregon University attended the listening session. Senator Dembrow, acting Chair, welcomed the students and task force members and explained the meeting's purpose and structure. Task force members sat in groups of one or two at tables with groups of four or five students. The students described their educational experiences and responded to questions from the task force members. At approximately 40-minute intervals, task force members moved to new tables to talk with different groups of students.

Site Tour

Eastern Oregon University

Members Present: Sen. Dembrow, Sen. Findley, Sen. Frederick, Rep. Owens, Rep. Ruiz

Members Excused: Sen. Robinson, Sen. Wagner, Rep. Alonso Leon, Rep. Zika

Other legislators present: None.

Two student tour guides led task force members on a tour of Eastern Oregon University's campus and were joined by: the university's president, Tom Insko; the Vice President for University Advancement, Tim Seydel; and Kyle Thomas of the Higher Education Coordinating Commission. The tour stopped at several locations on campus, including a historic staircase, a music class, the student center, and the theater. University officials described the university's sports programs, the states and countries students come from, and the language services the university provides.

Joint Task Force on Student Success for Underrepresented Students in Higher Education

Meeting Summary – Ontario Field Trips
May 11, 2022

Community Leaders Roundtable

Treasure Valley Community College
Building #4 (Weese Building), Room 110
650 College Blvd, Ontario, OR 97914

Members Present**: Sen. Dembrow, Sen. Findley, Sen. Frederick (ex officio), Rep. Owens, Rep. Ruiz**

Members Excused**: Sen. Robinson, Sen. Wagner, Rep. Alonso Leon, Rep. Zika**

Non-Member legislators present: **None**

The task force convened at 8:15 AM at Treasure Valley Community College (TVCC) to meet with local education stakeholders. The meeting included invited members of the TVCC governing board, TVCC faculty and staff, superintendents of local school districts, Urban League of Portland, Malheur County Poverty to Prosperity Initiative, Malheur Education Service District, local community college presidents, and Associated Student Government. The discussion addressed issues concerning infrastructure, college affordability, dual credits, non-transferable college credits, licensure reciprocity, instructor turnover and retention, the Higher Education Coordinating Commission and coordination between regulatory entities, statewide oversight of higher education, need for school counselors, career technical education (CTE), bridge between high school and college, student hunger, student housing, teacher workload and pay, stable and adequate funding, and education reform.

Faculty and Staff Roundtable

Treasure Valley Community College
Building #4 (Weese Building), Room 110
650 College Blvd, Ontario, OR 97914

Members Present: **Sen. Dembrow, Sen. Findley, Sen. Frederick (ex officio), Rep. Owens, Rep. Ruiz**

Members Excused: **Sen. Robinson, Sen. Wagner, Rep. Alonso Leon, Rep. Zika**

Non-member legislators present: None.

The task force convened at 10:00 AM at Treasure Valley Community College (TVCC) to meet with TVCC staff and faculty. The discussion addressed issues concerning student housing and transportation, financial aid eligibility and requirements, non-transferable college credits, teacher workload and pay, faculty and staff recruitment, educating parents about the value of higher education, increased student

support services, Wi-Fi infrastructure, stable and adequate funding, bonding capacity, dual credits and partnering with high schools, professional development, and CTE.

Student Listening Session

Treasure Valley Community College
Building #4 (Weese Building), Room 110
650 College Blvd, Ontario, OR 97914

Members Present: Sen. Dembrow, Sen. Findley, Sen. Frederick, Rep. Owens, Rep. Ruiz
Members Excused: Sen. Robinson, Sen. Wagner, Rep. Alonso Leon, Rep. Zika
Other legislators present: None
Approximately 20 students and alumni attended the listening session at Treasure Valley Community College. Senator Dembrow, acting Chair, welcomed the students and task force members and explained the meeting's purpose and structure. Task force members sat in groups of one or two at tables with groups of four or five students. The students described their educational experiences and responded to questions from the task force members. After 30 to 40 minutes at each table, task force members moved to new tables to talk with different groups of students.

Site Tour

Treasure Valley Community College

Members Present: Sen. Dembrow, Sen. Findley, Sen. Frederick, Rep. Owens
Members Excused: Sen. Robinson, Sen. Wagner, Rep. Alonso Leon, Rep. Ruiz, Rep. Zika
Other legislators present: None
Treasure Valley Community College's Recruiting Coordinator, Chase Van Weerdhuizen, led task force members, College president Dr. Dana Young, and Abby Lee, Associate Vice President of College and Public Relations, on a campus tour. The tour began and ended in the Weese building where the library and multicultural center are, and where peer mentoring occurs. In the Oregon Trail building, the group toured classrooms and spaces where high school equivalency and English for Speakers of Other Languages classes are held. The next stops were in the Florence Findley Career and Technical Education Center; Barbara Hall, where math, computer, English departments are located; and the Student Center, with financial aid, admissions, and disability services offices.

Central Oregon (virtual): May 31, 2022.

Detailed Agenda

DETAILED AGENDA: VIRTUAL SITE VISIT FOR CENTRAL OREGON
MAY 31, 2022

Participating Institutions:

Oregon Institute of Technology, Klamath Falls
Klamath Community College, Klamath Falls
Oregon State University-Cascades, Bend
Central Oregon Community College, Bend
Columbia Gorge Community College, The Dalles

Time	Event	Location
8:00 AM – 9:45 AM	Roundtable with Community Leaders	Virtual
10:00 AM – 11:45 AM	Roundtable with Faculty and Staff	Virtual
1:00 PM – 2:30 PM	Student Listening Session	Virtual – Breakout Rooms
3:00 PM – 4:30 PM	Presentations from Higher Education Institutions in Central Oregon	Virtual
5:00 PM – 6:00 PM	Public Comment Period	Virtual

Central Oregon (virtual): May 31, 2022.

Meeting Summary

Joint Task Force on Student Success for Underrepresented Students in Higher Education

Meeting Summary – Central Oregon Field Trips
May 31, 2022

Student Listening Session
Virtual Meeting
Members Present: **Rep. Alonso Leon, Chair; Rep. Owens; Sen. Dembrow; Sen. Wagner; Sen. Frederick, ex-officio**
Members Excused: **Rep. Ruiz; Rep. Zika; Sen. Findley; Sen. Robinson**
Other legislators present: **None**
The task force met virtually with a group of 12 students from Klamath Community College, Oregon Institute of Technology, Oregon State University-Cascades, and Central Oregon Community College. Representative Alonso Leon, Chair, welcomed the students and task force members and explained the meeting's purpose and structure. The group dispersed into three separate breakout rooms that included one or two task force members and four students. The students described their educational experiences and responded to questions from the task force members. The task force members spent the entirety of the allotted time in their assigned breakout rooms.

Snake River Correctional Institution and Coffee Creek Correctional Facility (virtual): July 14, 2022.

Meeting Summary

Joint Task Force on Student Success for Underrepresented Students in Higher Education

Meeting Summary – Coffee Creek Correctional Facility and Snake River Correctional Institution (Virtual Visit)
July 14, 2022
10:30 AM

Student Listening Session
Virtual Meeting
Members Present: **Rep. Alonso Leon, Chair; Rep. Zika; Sen. Dembrow; Sen. Frederick, ex-officio**
Members Excused: **Rep. Owens, Rep. Ruiz; Sen. Findley; Sen. Robinson; Sen. Wagner**
Other legislators present: **None**
The task force met virtually with two groups of women and men who are incarcerated at Coffee Creek Correctional Facility and Snake River Correctional Institution, respectively, and are enrolled in prison education programs through partnerships with local higher education institutions. Staff from the Department of Corrections and educators from higher education institutions were also present. Representative Alonso Leon, Chair, welcomed the group and explained the meeting's purpose and structure. The students individually described their educational experiences and responded to questions from the task force members. The meeting lasted roughly one hour and fifteen minutes.

Southern Oregon: July 20-21, 2022.

Detailed Agendas

DETAILED AGENDA: SITE VISIT TO ASHLAND AND MEDFORD
JULY 20-21, 2022

July 20, 2022
Host Institution: Southern Oregon University, Ashland

Time	**Event**	**Location**	**Parking**
8:00 AM – 9:45 AM	Roundtable with Community Leaders	Stevenson Union, Rogue River Room 1118 Siskiyou Blvd., Ashland, OR 97520	Lot 36 (see map) Use code ***[redacted]***
10:00 AM – 11:45 AM	Roundtable with Faculty and Staff	Same as above	
1:30 PM – 3:30 PM	Student Listening Session	Stevenson Union, Room 202 1118 Siskiyou Blvd., Ashland, OR 97520	
4:00 PM – 5:00 PM	Site Tours	Various, starting at Stevenson Union	
5:30 PM – 7:00 PM	Public Comment Period	Stevenson Union, Rogue River Room 1118 Siksiyou Blvd., Ashland, OR 97520	

July 21, 2022
Host Institution: Rogue Community College, Table Rock Campus, White City

Time	Event	Location	Parking
8:00 AM – 9:45 AM	Roundtable with Community Leaders	Health Professions Building (Bldg. C), Room 220 7800 Pacific Ave, White City, OR 97503	Free parking in lot at Pacific Ave & Ave C
10:00 AM – 11:45 AM	Roundtable with Faculty and Staff	Same as above	
1:30 PM – 3:30 PM	Student Listening Session	Same as above	
4:00 PM – 5:00 PM	Site Tours	Various	
5:30 PM – 7:00 PM	Public Comment Period	Main Building (Bldg. A), Room 184 7800 Pacific Ave, White City, OR 97503	

Southern Oregon: July 20-21, 2022.

Meeting Summaries

Joint Task Force on Student Success for Underrepresented Students in Higher Education

Meeting Summary – Ashland Field Trips
July 20, 2022

Community Leaders Roundtable

Southern Oregon University
Stevenson Union, Rogue River Room
1118 Siskiyou Blvd
Ashland, OR 97520

Members Present**: Rep. Alonso Leon, Chair; Sen. Dembrow; Sen. Wagner; Sen. Frederick, ex-officio**
Members Excused**: Rep. Owens; Rep. Ruiz; Rep. Zika; Sen. Findley; Sen. Robinson**
Non-Member legislators present: **Rep. Marsh**
The task force met with local campus and community leaders in a roundtable discussion format. Rep. Alonso Leon, Chair, and SOU President Richard Bailey jointly greeted the attendees and explained the meeting format. Rep. Alonso Leon, Chair, then began discussion by asking what each of the participants' organizations was doing to promote student success for underrepresented students in higher education settings. Discussion touched on the following topics:

- the proportion of Oregon high school students who continue on to higher education;
- Oregon's workforce needs in the coming years, including credentialing requirements for high-paying jobs;
- trauma-informed practices, cultural competency, and multilingual support in providing behavioral health and other student support services;
- the needs of Oregon's educator workforce, including addressing burnout, the COVID-19 pandemic, demographic shifts; state content standards, and licensure;
- mentorship in middle schools to guide students on a path toward higher education;
- data-sharing agreements between K-12 districts and higher education institutions;
- the impact of the 2020 wildfires on the communities of Southern Oregon;
- simplifying the process of transferring academic credit;
- the value of summer programs for new students, such as Summer Bridge and Strong Start;
- predictors of student success early in students' educational careers
- proactive parent and family engagement, particularly with communities of color; and
- the importance of adopting an equity lens at the institutional level.

Faculty and Staff Roundtable

Southern Oregon University
Stevenson Union, Rogue River Room
1118 Siskiyou Blvd
Ashland, OR 97520

Members Present**: Rep. Alonso Leon, Chair; Sen. Dembrow; Sen. Wagner; Sen. Frederick, ex-officio**
Members Excused**: Rep. Owens; Rep. Ruiz; Rep. Zika; Sen. Findley; Sen. Robinson**
Non-Member legislators present: **Rep. Marsh**
The task force met with faculty and staff of Southern Oregon University in a roundtable discussion format. Rep. Alonso Leon, Chair, greeted the attendees and asked how each participants' perspective on working with students helped their understanding of how to promote student success for underrepresented students. Discussion touched on the following topics:

- increasing student debt as a result of gradual disinvestment in public higher education;
- a historical lack of focus on student success in lieu of enrollment;
- the relationship between affordability and time to completion of a degree or certificate;
- the relative purchasing power of veterans' benefits such as the G.I. Bill;
- declining participation in scholarly honors societies as a function of faculty workload;
- student-to-counselor ratios and utilization of services available on campus;
- access to health services for students,
- the importance of cultural competency in offering support services to students;
- high debt loads causing students to choose degrees that offer more lucrative career opportunities;
- challenges of taking advantage of the Public Service Loan Forgiveness program;
- challenges faced by students, including homelessness, the cost of child care, the impact of COVID-19, and the 2020 wildfires;
- the importance of athletics programs in attracting multiple generations of students;
- additional burdens placed on faculty and staff of color;
- barriers created by academic holds; and
- whether the FAFSA should be required as a requirement to graduate from high school.

Student Listening Session

Southern Oregon University
Stevenson Union, Room 202
1118 Siskiyou Blvd
Ashland, OR 97520

Members Present: **Rep. Alonso Leon, Chair; Sen. Dembrow; Sen. Wagner; Sen. Robinson; Sen. Frederick, ex-officio**
Members Excused: **Rep. Owens; Rep. Ruiz; Rep. Zika; Sen. Findley**
Other legislators present: **None**
15 students of Southern Oregon University attended the listening session. Rep. Alonso Leon, Chair, welcomed the students and task force members and explained the meeting's purpose and structure. Task force members sat individually at tables with groups of three or four students. The students described their educational experiences and responded to questions from the committee members. Approximately every 30 minutes, task force members moved to new tables to talk with different groups of students.

Site Tour

Southern Oregon University
1118 Siskiyou Blvd
Ashland, OR 97520

Members Present: **Rep. Alonso Leon, Chair; Sen. Dembrow; Sen. Wagner; Sen. Frederick, ex-officio**
Members Excused: **Rep. Owens; Rep. Ruiz; Rep. Zika; Sen. Findley; Sen. Robinson**
Other legislators present: **None**
The task force embarked on a tour of several facilities on the Southern Oregon University campus. The tour began with a visit to the Social Justice Equity Center, presented by Marvin Woodard. Next, the task force visited the campus food pantry, presented by Frankie Mora. Lastly, the task force visited the arts studio in the Marion Ady Building, presented by Prof. Bren Florendo and a group of students, in a Native American Studies drum creation class, which is part of the Konaway Youth Program. The task force members also discussed pre-college programs, student engagement, and a variety of funding sources for the programs displayed on the tour.

Joint Task Force on Student Success for Underrepresented Students in Higher Education

Meeting Summary – White City Field Trips
July 21, 2022

Community Leaders Roundtable

Rogue Community College, Table Rock Campus
Building C, Room 220
7800 Pacific Ave
White City, OR 97503

Members Present**: Rep. Alonso Leon, Chair; Sen. Dembrow; Sen. Wagner; Sen. Frederick, ex-officio**
Members Excused**: Rep. Owens; Rep. Ruiz; Rep. Zika; Sen. Findley; Sen. Robinson**
Non-Member legislators present: **None**
The task force met with local campus and community leaders in a roundtable discussion format. Rep. Alonso Leon, Chair, and RCC President Randy Weber jointly greeted the attendees and explained the meeting format. Rep. Alonso Leon, Chair, then began discussion by asking what each of the participants' organizations was doing to promote student success for underrepresented students in higher education settings. Discussion touched on the following topics:

- the decentralized nature of the state's workforce development system;
- longitudinal data systems and data-sharing partnerships across the education and business sectors;
- the importance of soft skills development for students to transition into the workforce;
- grants made available under the Future Ready Oregon initiative;
- the social determinants of health for students, including wellness and financial stability;
- various uses of Medicaid dollars for promoting health and wellness, leading to better educational outcomes;
- the complexity of applying for various public benefits programs and the value of the benefits navigators positions created by HB 2835 (2021);
- widening the definition of "student success" to include learning acquired without earning a degree or certificate;
- a perceived stigma surrounding Adult Basic Skills programs;
- affordability concerns, including tuition and fees, housing, child care, elder care, and transportation;
- characteristics of an open admissions policy;
- outcomes of programs such as Pathways to Opportunity and TRiO;
- partnerships between K-12 districts and community colleges, including dual credit programs; and
- the relatively simple funding distribution method under the Student Success Act.

Faculty and Staff Roundtable

Rogue Community College, Table Rock Campus
Building C, Room 220
7800 Pacific Ave
White City, OR 97503

Members Present**: Rep. Alonso Leon, Chair; Sen. Dembrow; Sen. Wagner; Sen. Frederick, ex-officio**
Members Excused**: Rep. Owens; Rep. Ruiz; Rep. Zika; Sen. Findley; Sen. Robinson**
Non-Member legislators present: **None**
The task force met with faculty and staff of Southern Oregon University in a roundtable discussion format. Rep. Alonso Leon, Chair, greeted the attendees and asked how each participants' perspective on working with students helped their understanding of how to promote student success for underrepresented students. Discussion touched on the following topics:

- challenges faced by the campus library system;
- proposed changes to the Community College Support Fund distribution formula;
- proposed mandatory minimum staffing levels, as exist in law in other states;
- some students' relative lack of basic knowledge and skills needed to succeed academically, as well as a reluctance to seek help;
- inadequate access to technology and the Internet in rural areas;
- severe housing cost burdens faced by students due a shortage of housing units in the region;
- limitations of the Oregon Promise Grant program;
- challenges faced by LGBTQ2IA+ students who live in rural areas;
- high student-to-counselor ratios;
- the importance of student government advocacy;
- challenges of accessing public transportation across multiple counties and transit systems;
- a campus-wide reporting system for alerting counselors to attend to students in crisis;
- the potential for new student orientation events to expose students to available support resources;
- student employment opportunities on campus beyond those available via the Federal Work-Study program;
- the "benefits gap" faced by students who are eligible for some public benefits and not others;
- recent temporary expansions of public benefits programs during the COVID-19 pandemic;
- importance of multilingual education for undocumented students; and
- housing costs and shortages in the region since the 2020 wildfires.

Student Listening Session

Rogue Community College, Table Rock Campus
Building C, Room 220
7800 Pacific Ave
White City, OR 97503

Members Present**: Rep. Alonso Leon, Chair; Sen. Dembrow; Sen. Wagner**
Members Excused**: Rep. Owens; Rep. Ruiz; Rep. Zika; Sen. Findley; Sen. Robinson; Sen. Frederick, ex-officio**
Non-Member legislators present: **None**
21 students of Rogue Community College attended the listening session. Rep. Alonso Leon, Chair, welcomed the students and task force members and explained the meeting's purpose and structure. Task force members sat individually at tables with groups of seven students. The students described their educational experiences and responded to questions from the committee members. Approximately every 40 minutes, task force members moved to new tables to talk with different groups of students.

Site Tour

Rogue Community College, Table Rock Campus
7800 Pacific Ave
White City, OR 97503

Members Present: **Rep. Alonso Leon, Chair; Sen. Dembrow; Sen. Wagner**
Members Excused: **Rep. Owens; Rep. Ruiz; Rep. Zika; Sen. Findley; Sen. Robinson; Sen. Frederick, ex-officio**
Other legislators present: **None**
The task force embarked on a tour of several facilities on the Table Rock campus. The tour began in the Health Professions Building (Building C), where task force members observed a high fidelity simulation lab, the medical assist lab, the phlebotomy lab, and a functioning dental clinic. Next, the task force visited Building B, where Gary Heigel, a professor and chair of the college's paramedical program, presented the emergency medical services (EMS) program, which features an immersive learning approach. Lastly, the task force visited the college's manufacturing lab, including the visual design program, commercial driver's license (CDL) program, second chance program, diesel program, and high-tech manufacturing center. The task force members also learned about the Newbridge High School Partnership Program within the Rogue Valley Youth Correctional Facility. Task force members also discussed housing challenges, including land, zoning, and construction costs, and the challenges faced by employers to find qualified workers with advanced skills as soon as possible.

Appendix C: Quotes from Student Experience

Quotes heard by legislators from students and support staff during listening sessions at community colleges and universities around the state of Oregon:

Danny, Community College Student – "Benefit navigators are really important. They help students connect to housing, food, childcare… We don't know nothing about these resources out there."

University student who came to study from American Samoa – "I came here majoring in biology. I did ROTC for 3 years for housing. Before long my mental health was on the edge. Not having money. Really stressing, taking away hope. I'm not eligible for food stamps, Medicaid. No work study allowed. We have to work hard to get money. At the same time we're also studying on different hours. I'm hoping to work at the university as an advocate for Samoan students, but at the same time I'm on the brink of dropping out. I have to take out personal loans. For work, we are restricted to 20 hours on campus. But we can't work off campus. Can the state up that?"

Dalia, Portland, University student – "I'm a first generation student from a low income background. I come from an undocumented family, my parents had little information about higher education. When I decided to continue higher education, it was stressful. I sat down with a friend to consider costs. I discovered my only option was to take out loans to cover the rest of the expenses."

Jasmine, Community College Student – "When you see a Latina, the only Latina in her medical field, but she's struggling. So you start thinking, can I even do that?"

Former Army Medic now at University – "Coming out of active is extremely difficult. We have a military advisor Willy, I love him. I see two glaring resources missing. One, not enough mental health resources. We have CaPServices but that's difficult to get into. Most on zoom. Second: we don't have a psych person who had military experience. Finally, there's not enough protections for students on stuff the faculty can do to you."

Rural Native American Student at University – "The Native community has a lot of expectations, to uphold traditional practices. Missing time for cultural leave is a thing we have to do, but teachers don't understand. It's like two different worlds. We hear that too from veterans."

Jaquelyn, University student – "I'm a first generation Latina college grad. I experienced tremendous biases, including among my counselors. I strongly recommend that funding be available at the K12 level for career counselors. I expect that counselors receive training on how to work with diverse students. Even filling out a FAFSA form. We also need educational outreach programs, that increase the pipeline, but also promote retention."

Community College Student in Southern Oregon – “I wasn’t aware of what is available. My wish is that these kind of supports were available and present for people earlier in intervening. It took until I was in therapy that someone told me working towards a degree is something that I can do. There should be some bridge between services in school. If I wasn’t in such a hard spot I would have had no idea that this was available.”

Quotes from Support Staff at a Coastal Community College –
“We need our universities to sync up with Community Colleges. More on ramps, and more off-ramps.”
“Cost of attendance is too high. I’m from another state, and I can’t believe how much it is here. If students do decide to go often they only take 1 or 2 classes. I work with students on financial aid and many won’t get student loans. They know better.”
“Have we taken a step back to look at the application process? The real money saver and time saver would be a statewide state-administered system. So that if I transfer the state already has the information.”
“Accessibility is key. For people I grew up with around here, after high school there are two paths: You either go away to a college or you have a job waiting for you. So many people think that college isn’t for them.”
“Students need us as available as possible. Be available, be open, whatever people need, have available. Childcare – We had that when I went through here. That’s a big one we hear a lot.”

Isabelle, Portland, University student – “I’m a transfer student in the “transfers finish free” program. When you hear the term the assumption is that the cost will be free. There’s hidden costs though. Housing here is impossible. Not included in transfers finished free. Stress is a barrier. Students want to be here, students want to learn. But the burden of finances is frankly not fair.”

Latina teaching student finishing school at SOU – “One college advisor in High School was key for all of my college. We need more help getting the word out there to low-income students. It’s important to get to student before they lose hope. Now that I’m a Mom, I’m going in to one year of student teaching and it’s like ‘How am I gonna get through it with no income.’”

Appendix D: Work Group Documents

Work Group 1: Financial Aid and Affordability.

Submitted Policy Proposals

Work Group on Financial Aid and Affordability
Policy Proposals Survey Results

Submitter	Carolyn Williams, Mt. Hood Community College
Title of proposal	OSAC should accept FAFSAs with professional judgement for consideration for the Oregon Opportunity Grant and Oregon Promise Grant.
Detailed description	Students that have professional judgements approved by a Financial Aid Office are currently not considered for the Oregon Opportunity Grant or Oregon Promise Grant. These are students who may have abusive parents or have been abandoned by their parents or have had substantial drops in their family income. If the professional judgement procedure is sufficient for the Dept of Education, it should be sufficient for OSAC to consider these students like every other student for these Oregon grants.
What problem will this proposal address?	These are some of our most vulnerable students, without parental support and very limited resources or students whose family income has changed dramatically since the prior-prior year income used on the FAFSA. It's frustrating that we can offer them a Federal Pell Grant but they are not considered for the Oregon grants. It is a robust process with documentation required for a professional judgement to be approved by a Financial Aid Office.
What would be a successful outcome of your policy proposal?	Students that have had a professional judgement approved and processed on their FAFSA being considered for Oregon grant eligibility the same as other Oregon students would be a successful outcome.
How will you measure successful implementation?	OSAC no longer considering professional judgements as an excluding factor on students' FAFSAs when calculating Oregon grant eligibility.
What is the timeline for implementation?	Starting with the 23-24 school year would be ideal
Which entities will be responsible for implementing this policy?	OSAC and possibly HECC?
What accountability measure(s) should be in place to ensure successful implementation?	Whatever mechanism that is currently in place that causes OSAC to ignore FAFSAs that are coded with "professional judgement" just needs to be removed. Students with professional judgements approved on their FAFSAs being eligible for the Oregon grants would be a successful outcome.

Which existing statutes or programs will this policy affect?	Oregon Opportunity Grant and Oregon Promise Grant Not sure if the eligibility requirement excluding professional judgement FAFSAs is in statute, seems like it would be part of the internal eligibility criteria that OSAC uses for determining awards.
Do you have any additional questions or comments you would like to share with the Task Force?	Please increase Oregon Opportunity Grants with larger awards, especially for our neediest students. Oregon Promise Grants disproprotionately help students from higher incomes. Our budgeting reflects our values. Please give far greater funding for Oregon Opportunity Grants. I'm also concerned with the Oregon Promise Grant becoming more and more complicated adminstratratively. Financial aid offices are stretched thin. Please increase funding for community colleges in general.Thank you!

Submitter	Rep. Nathan Sosa, House District 30
Title of proposal	Expanding Work-Study Options to Include Non-Profit Organizations
Detailed description	I propose a pilot program at one or two public universities in which students are given discounted tuition in exchange for working at a non-profit organization in the community. Any non-profits interested in a student worker would register with the program administrator(s) at the university. The administrator would then pair the non-profit with a student. Ideally, the student would be paired with an organization relevant to their field of study. The non-profit would hire and pay the student an equitable wage. So long as the student remained employed by a participating non-profit and completed a certain number of work hours, they would receive discounted tuition.
What problem will this proposal address?	1. College Affordability: higher education will cost less for participating students who receive discounted tuition. 2. Transition from University to Workforce: students will have a smoother transition into their career field by gaining valuable skills and connections in their desired industry. 3. Non-Profit Workforce Shortages: non-profits, which often struggle to hire / retain employees, will have access to a new pool of applicants.
What would be a successful outcome of your policy proposal?	A successful outcome would be twofold. First, it would be a large number of students participating in the program, incurring less debt for college, and making a successful transition into their career fields thanks to their experience in the non-profit sector. Second, it would be non-profits expanding their efforts in the community based on the increased energy / capacity created by student workers.
How will you measure successful implementation?	It would be measured by the number of students and non-profits participating in the program.
What is the timeline for implementation?	Upon the receipt of funding, a pilot program could likely be operational in less than one year.
Which entities will be responsible for implementing this policy?	Higher Education Coordinating Commission and the participating universities.
What accountability measure(s) should be in place to ensure successful implementation?	Accountability measures would include the program administrators (1) confirming the existence and validity of the participating non-profits; (2) tracking the number of student participants, (3) periodically verifying the students' work hours with the non-profits, and (4) conducting follow-up surveys with the participating students as well as the non-profits.
Which existing statutes or	Unknown.

programs will this policy affect?	
Do you have any additional questions or comments you would like to share with the Task Force?	

Submitter	Jennifer Simonson, Executive Director, YMCA of Columbia Willamette
Title of proposal	Relook at Homeowners or Rent return tax break. When I was in college late 80's we had a renters return tax break that allowed those making under a certain income level to receive a credit from what they paid in rent. This was extremely helpful for me in college and helped offset living expenses. I think this would be beneficial to break the cost of housing barrier.
Detailed description	Please see above. This was a tax relief program that was in Oregon 1970-80's.
What problem will this proposal address?	Cost of living expenses.. primarily cost of housing, which can be the largest expense.
What would be a successful outcome of your policy proposal?	The tax relief program being passed and giving relief both to students that otherwise might not have access to go to college and others in the state that are facing challenges with housing prices currently. We know that cost of housing is one of the biggest struggles facing people today and this could ease some of the pressure and stress on those individuals.
How will you measure successful implementation?	Giving greater access to students and those facing housing insecurities.
What is the timeline for implementation?	Not sure how quickly a tax relief program can be put in place.
Which entities will be responsible for implementing this policy?	It would be filed with individuals income taxes. As a student there was a year I didn't work and was able to file with this relief program and received a portion of the rent I paid back which helped me with my living expense.
What accountability measure(s) should be in place to ensure successful implementation?	Making sure everybody is aware of the relief program. Many times tax relief options are not well advertised and then missed by those that could benefit. This would be something that should be known my financial aide departments counselors, sent out to all individuals by mail etc
Which existing statutes or programs will this policy affect?	I'm not sure about this. Not even sure I'm answering the questions right. This is new to me and I just think we need to make education more accessible.
Do you have any additional questions or comments you would like to share with the Task Force?	Please reach out if you have questions as I'm not sure I answered these correctly.

Submitter	Dylan DeLoe, Former Library Assistant-Blue Mountain Community College and Student-Oregon State University
Title of proposal	"Learners Working For Affordable Materials"
Detailed description	Addressing Rising Textbook Costs in 2 Parts 1. Contracting with a university/college program to create registration software that communicates with online bookstore sites (software that may also need to be created) to automate accurate course marking. 2. Increasing funding to Open Oregon Educational Resources to their "expansion" request of 4.5 million per biennium to continue indefinitely. Other funding options include a "growth" option request at $3.1 million, or a "maintain" option request at $2.4 million.
What problem will this proposal address?	The Issue: The problem of rising textbook costs is often viewed as a separate issue from general financial aid and affordability measures as it pertains to the systemic ways in which we address each. This is often coupled with issues of low administrative support and expensive third party contracts that institutions engage in that create a hodgepodge of software applications that do not communicate with one another, and do not allow room to implement affordability measures passed previously by the Oregon state legislature. This is a comprehensive approach to create tools—as well as learning opportunities—for Oregon college and university students to achieve affordability measure compliance, user-centered design, and support of already existing efforts to inform students so they can make sound financial decisions and lower the cost of attending higher education. When done the way this proposal outlines, Oregon students benefit and taxpayers keep their money here in Oregon. "Low-cost" and "no-cost" designations are arbitrary, and the nature of manual entry (the currently predominant means of communicating textbook costs, if an institution's software allows for it) means that course marking is very infrequent and sometimes inaccurate. In tandem with on-time adoption recommendations in HB2919, an automated program used by all colleges and universities will mean students are informed with uniformity and could even provide a range of exact price points at the time of registration. Supporting efforts to create open educational resources and easing access for instructors to adopt said resources is a crucial step to any cost-saving policy concerning course materials. Open Oregon Educational Resources has been at the forefront of aiding project management, instructional design, grant writing, and grant funding of OER creation and pilot instruction across the state. Their website also houses many course materials created by Oregon educators and adjustments will be made to make the repository space more effective in aiding adoption of these free materials. At its current operational level, some of its services will become unavailable or its capacity for services will diminish as grant funding for the organization lapses. In order to continue offering professional development opportunities and expand its

	capacity for OER projects, including translation of materials into non-English languages, expansion of openly licensed materials in upper division courses and trades, and more, this policy recommends increasing ongoing funding by $4.5 million per biennium to continue indefinitely, as per the organization's request.
What would be a successful outcome of your policy proposal?	Success of this proposal means that OER creation and pilot instructing efforts are bolstered with immediate effect and within 3 years time, Oregon's public colleges and universities will attain 100 percent compliance with "course marking" (marking exact price ranges for required course materials at the point of course registration).
How will you measure successful implementation?	Success of this proposal means that OER creation and pilot instructing efforts are bolstered with immediate effect and within 3 years time, Oregon's public colleges and universities will attain 100 percent compliance with "course marking" (marking exact price ranges for required course materials at the point of course registration).
What is the timeline for implementation?	1 year to take contract proposals from computer science and graphic design programs for work study to build registration software and/or campus bookstore software that aligns and communicates display for price ranges. -> HECC makes selection of proposal/s. -> Approx. 2 years for the build and QA testing -> Public colleges and universities adopt the new software. Funding for Open Oregon Educational Resources effective upon passage.
Which entities will be responsible for implementing this policy?	Contracted programs, HECC, Student Services departments at colleges and universities, Open Oregon Educational Resources
What accountability measure(s) should be in place to ensure successful implementation?	N/A
Which existing statutes or programs will this policy affect?	HB2919
Do you have any additional questions or comments you would like to share with the Task Force?	https://openoregon.org/the-oer-movement-needs-a-change/

Submitter	Dylan DeLoe, Student-Oregon State University and Former Library Assistant-Blue Mountain Community College
Title of proposal	Support for Student Parents
Detailed description	The state will seed child care programs on all public college and university main campuses, ensuring with funding that enrolled students pay nothing for child care, and that it is adequately staffed with a combination of employees and work study/internship opportunities for family sciences and early childhood education students, primarily, but does not exclude students seeking work study from other major degree pathways. Child care services may also be open to the public for paid services, as long as per child fees do not exceed the average per child costs within the county where the college or university is located.
What problem will this proposal address?	Child care availability is lacking in the state of Oregon and it affects student parents—especially in rural communities—in unique ways. Some institutions do not allow children into the classrooms with their parents, some communities lack affordable options to child care, and some lack child care completely. Prospective students may choose not to come to school for the obligations they have to care for their children, and student parents are forced into situations where they cannot take the time to confront the challenges of the classroom, instead having to juggle all their challenges at once. This allows socioeconomic conditions to become calcified over generations of students, as it leads some to not engage in higher education, or drop out of the system without a certificate, but with debt.
What would be a successful outcome of your policy proposal?	An increase in retention and graduation among student parents will be hard to grasp with a lack of data in this field currently, however, measuring success, at least early on, can be done by documenting the number of children served, and how many hours they are cared for, as a part of this policy. With these measurements, institutions should also gather information about the frequency of student parents being enrolled, and the increases in enrollment, retention, and graduation rates for student parents over time.
How will you measure successful implementation?	An increase in retention and graduation among student parents will be hard to grasp with a lack of data in this field currently, however, measuring success, at least early on, can be done by documenting the number of children served, and how many hours they are cared for, as a part of this policy. With these measurements, institutions should also gather information about the frequency of student parents being enrolled, and the increases in enrollment, retention, and graduation rates for student parents over time.
What is the timeline for implementation?	If passed in the 2023 long session, the child care programs should open and accept children into the program beginning Fall term 2024.
Which entities will be responsible for	Colleges and Universities, overseen by DHS/HECC.

implementing this policy?	
What accountability measure(s) should be in place to ensure successful implementation?	N/A
Which existing statutes or programs will this policy affect?	N/A
Do you have any additional questions or comments you would like to share with the Task Force?	

Submitter	Dylan DeLoe, Student-Oregon State University
Title of proposal	Promoting Healthy Campuses Policy Proposal
Detailed description	Any credit-earning student will be eligible for OHP Basic or Citizenship Waived Medical. The OHP Basic Plan will add immunizations, medical equipment and supplies, labor and delivery, reproductive health care, emergency care, emergency transport, vision and hearing, to the already existing benefits offered by OHP. CWM benefits will be changed to match the benefits offered by OHP.
What problem will this proposal address?	Many students in Oregon venture to college and university campuses to improve their socioeconomic condition, but they often do so without adequate support, especially when a lot of them are leaving their family homes for the first time. Some may not know about what is available or have never been eligible for services before. Even for those lucky enough to get on the OHP Basic Plan, many necessary services are not covered, and must be paid for out of pocket. All of these issues are even more apparent when looking at prospective students from across the globe, coming to Oregon for a quality education, who may struggle to get any coverage from OHP or otherwise. An expansion of eligibility to all students enrolled in classes that earn credit and expansion of services covered by OHP's Basic Plan and Citizenship Waived Medical (CWM) will address these costs.
What would be a successful outcome of your policy proposal?	Success means that more students in all income brackets are taking more appointments and more services are being covered by OHP and CWM overall.
How will you measure successful implementation?	Basic Needs Navigators on campuses as a result of HB2835 will organize on-campus communications about changes to eligibility and help students apply for enrollment in OHP and CWM. They will also report the number of student applicants to each healthcare program, along with basic demographic and economic information that is typically gathered when applying.
What is the timeline for implementation?	Implementation will take place the fall term following the bill's passage.
Which entities will be responsible for implementing this policy?	Basic Needs Navigators, Legislature, Health Clinics
What accountability measure(s) should be in place to ensure successful implementation?	N/A
Which existing statutes or	HB2835

programs will this policy affect?	
Do you have any additional questions or comments you would like to share with the Task Force?	

Submitter	Elizabeth Guzman Arroyo, Statewide Director of STEP & Pathways to Opportunity, Portland Community College
Title of proposal	Affordability & Financial Aid Student Equity & Success Proposal
Detailed description	1. Expand the Oregon Opportunity Grant: Expanding the Oregon Opportunity Grant (OOG) would allow Oregon residents with financial need to access in-state higher education at higher rates. Increasing the overall funding and maximum awards of the OOG would make sustainable and affordable access a reality for a larger number of low- and middle income Oregon residents. We recommend moving away from covering a percentage of the cost of attendance, towards the goal of fully covering tuition and fees, this model would be similar to the Washington College Grant. Further, we recommend two specific changes to broaden the scope of who can benefit from the OOG: remove current restrictions of half- or full-time enrollment to receive an OOG award and increase access and flexibility of eligibility to include non-traditional learners which is a growing demographic in the student population. This includes non-credit certificates and training programs, as well as adult-basic skills, and other on-ramp programs often seen as the only option for low-income adult learners with limited time and financial capacity to engage in post-secondary education. In order to maximize the state's investment, it is important to pair investments in student financial aid with investments in institutional support funds. 2. Provide permanent funding for the Tribal Grant: Continuous funding of the Tribal Grant provides continued access to post-secondary education for Oregon Tribal members, rather than split family support. 3. Increase funding for the Child Care Grant and add support for campus child care facilities to address child care shortages: Parenting students are an under-resourced population in which an increase in the Child Care Grant paired with financial support for on-campus child care facilities would provide a multi-generation impact in gained economic mobility. 4. Increase support for HB2835 Benefits Navigators: Provide a program budget to each benefit navigator across Oregon's twenty-four public post-secondary institutions allowing increased structure build-out and effectiveness of benefits integration models. Funds would be used for peer-advocate programs, direct student emergency aid, or other program needs identified by individual institutions and aligned with intent of HB2835 such as administration of on-campus food pantries or subsidized meal programs. 5. Allow families to prepay tuition: The State of Florida allows families to prepay college and state university tuition through monthly contributions to the state's 529 college savings plan. The State of

	Florida guarantees family investments. Allowing Oregon families to prepay tuition through state-guaranteed investments or partnerships with Oregon philanthropic organizations, increasing a sense of security for low-income historically marginalized communities, would make higher education a reality for middle-income families.
What problem will this proposal address?	The proposals outlined increase student access and persistence by addressing financial barriers to tuition and cost of living.
What would be a successful outcome of your policy proposal?	Increased access, persistence, and completion rates of underrepresented student populations.
How will you measure successful implementation?	Disaggregated data reports on awardees and college/university reports on completion rates.
What is the timeline for implementation?	Ongoing funding for all proposals with one year of structure build-out of new initiatives.
Which entities will be responsible for implementing this policy?	HECC, Public Post-Secondary Institutions, and Philanthropic Organizations (if identified as partner).
What accountability measure(s) should be in place to ensure successful implementation?	Reporting contracts with HECC.
Which existing statutes or programs will this policy affect?	Oregon Opportunity Grant, Tribal Grant, Child Care Grant, HB2835 Benefit Navigators (2021).
Do you have any additional questions or comments you would like to share with the Task Force?	

Submitter	Pam Blumenthal
Title of proposal	Affordable Rents for College Students (ARCS): providing affordable housing and support for students most in need
Detailed description	The Affordable Rents for College Students (ARCS) program was started in 2020 to provide affordable housing options for college students in Portland. We have doubled our capacity in the past year, but there is still an incredible need for affordable housing opportunities for low income, underrepresented students. Option 1 Subsidized housing for low income college students: $1,000,000 funding for ARCS (Affordable Rents for College Students) to scale program and increase capacity to house 100+ college students per year in current CHNW owned housing in Portland Metro Area Funding Impact: Provide immediate 50% subsidy for students most in need Retain students most at risk of dropping out Double current ARCS program capacity Help leverage other resources to sustain the program Students attending MHCC, PCC, CCC, and PSU would benefit from this investment Option 2 Appropriation for Housing Acquisition: $3-$5 million State appropriation to provide capital for housing acquisition to house low income students. Funding Impact: Support CHNW acquisition property Provide necessary gap funding (in addition to CHNW contribution) to create permanent, deeply affordable units at 30% AMI rents for at-risk students Ongoing ARCS funding would be leveraged to provide additional affordable units and support services at project

What problem will this proposal address?	Providing affordable rents for low income, underrepresented college students will allow more students to be retained and complete credentials. It will also encourage students to enroll who might otherwise not consider college an option. Students are only one demographic that have borne the impacts of rising economic challenges, one of which is reduced housing security. A Hope Center report found that close to 50% of students reported some degree of housing insecurity in 2020, whether it was having to sleep on a friend's couch, in a vehicle, or even outside. The issue of housing insecurity has larger ramifications beyond the impacts it causes on individual student lives. In aggregate, affordable housing shortages pose a serious threat to the reputations and financial wellbeing of higher education institutions, as well as the long history of federal investments in higher education. Students who experience housing insecurity or homelessness have lower GPAs and are less likely to graduate on time, if they graduate at all, reducing their opportunities to reap the benefits of higher education and increasing the likelihood of defaulting on educational loans. A college education can have a significant impact on a person's lifetime earnings, health and well-being, as well opportunities for their children. It also can mean the ability to support family, the time to volunteer and donate to social improvement efforts, and a higher contribution to government revenues in terms of property and income taxes. A college education can make a world of difference.
What would be a successful outcome of your policy proposal?	Providing more than 100 college students in the Portland Metro Area with afffordable, supportive housing. This would be a pilot for what could happen in other parts of Oregon through collaborative partnerships and innovative funding strategies. Increased college access and success for underrepresented students Elevating the issues of college student housing insecurity and supporting a solution that could be replicated throughout Oregon.
How will you measure successful implementation?	Housing more than 100 students (each year of the biennium). Increased retention and credit accumulation of students housed. All students supported are low income, majority students housed will be first generation, BIPOC, LGBTQIA2s+, and former foster youth.

What is the timeline for implementation?	With additional resources we could start housing students immediately. College Housing Northwest has apartments available at below market rents and with additional ARCS funding we can further subsidize rents to be $500-$600/month (30-40% AMI).
Which entities will be responsible for implementing this policy?	College Housing Northwest, Affordable Rents for College Students (ARCS) and partners (PCC,MHCC, CCC, PSU, New Avenues for Youth, NAYA)
What accountability measure(s) should be in place to ensure successful implementation?	Quarterly reporting on outcomes. Presentations to legislative committees.
Which existing statutes or programs will this policy affect?	Not sure what might be implicated. We do not think that there is anything that will be affected.
Do you have any additional questions or comments you would like to share with the Task Force?	For more information about our work here are a couple of links: https://www.koin.com/news/arcs-program-prevents-homelessness-for-college-students/. https://chnw.org/wp-content/uploads/2022/10/CHNW_ARCS_LostInTheShuffle.pdf

Submitter	Meghan Turley
Title of proposal	University Accountability Act
Detailed description	Set specific student housing commitments: Universities must establish firm commitments to house a greater percentage of their student bodies on-campus, and ensure that any growth in enrollment also corresponds with growth in housing. Set numerical deadlines for decreasing dependence on private rental housing. Must identify target rents for dorms that are competitive with the rents students can obtain by sharing private market rental housing. Accountability: Require each higher education institution to report either quarterly or by semester its total number of enrolled students, the number of students house both on- and off-campus, the locations of all university-owned or affiliated housing, and the specific addresses of each student housed off-campus (no personal identifiers). Require

	universities to analyze the impact students have on the city's housing market. Affordability: Increase student housing affordability and accessibility across the state by expediting the review process for affordable and sustainable student housing development
What problem will this proposal address?	The University Accountability Act will aid in reducing housing insecurity within the communities they inhabit. The struggle to find affordable housing while in college is an additional challenge for Oregon students while pursuing a degree. Additionally, the presence of university development and populations leads to increased rental costs off-campus. In the city of Eugene, 55% of renters spend more than 30% of their income on rent. It can be hard to figure out your basic needs while also attending classes. Low-income housing is already difficult to find in Oregon, with Oregon's housing wage ranking 13th highest in the nation. That means, at minimum wage, the average Oregonian would have to work 81 hours a week to afford average rent costs. The number is high for the average resident, and even more insurmountable for those trying to graduate. Universities would have a better idea of the number of students who are facing housing difficulties or may face difficulties soon if they understood the data about rental costs in student populated areas and maintained a more firm commitment to pacing enrollment and development. Collecting this data would also allow universities to inform the communities they inhabit, the state, and themselves about resources that are needed to help offset costs affiliated with housing.
What would be a successful outcome of your policy proposal?	Universities utilize data collected from housing commitment and survey to inform outreach efforts with students, development of on-campus programming to inform future tenants, and development of on-campus housing. Universities utilize data to collaborate with cities to address more systemic patterns that emerge through data collection about housing costs. Affordable housing projects will be given "by right" approvals, expediting them from tedious and extensive approval and zoning processes. Potential sites where affordable and mixed-income housing can be developed are expanded.
How will you measure successful implementation?	Universities comply through submission of reports as outlined through annual student housing commitments and surveys. Progress reports provided by the university to demonstrate active and intentional actions in their commitment to housing larger percentage of their student bodies on-campus and offsetting costs of surrounding market
What is the timeline for implementation?	An initial report of total number of enrolled students, number of student housing both on and off-campus, locations of all university-owned or affiliated housing, and the specific addresses of each student housed off-campus (no personal identifiers) and an analysis of be conducted of the impact students have on the city's housing market to provide a baseline

	to measure progress. Identifying trends will likely take a few years. For this reason, the timeline of implementation will likely take a few years.
Which entities will be responsible for implementing this policy?	The Higher Education Commission (HECC)and would be responsible for providing a set criteria for what is acceptable, intentional, and equitable progress and commitment from public Universities. Additionally, universities would be responsible for reporting adequate information and demonstrating an intentional and tangible commitment to student housing security. Creation of a State Task Force/Work Group
What accountability measure(s) should be in place to ensure successful implementation?	Universities would have to report to the HECC annually as well as sending a delegate to a State Task Force/Work Group
Which existing statutes or programs will this policy affect?	We are not sure of which existing statutes or programs this will affect. We expect that there will be overlap with urban development and infrastructure plans in university cities.
Do you have any additional questions or comments you would like to share with the Task Force?	

Submitter	Carolyn Williams
Title of proposal	Increase award amounts for the Oregon Opportunity Grant.
Detailed description	For a community college student, $3600 ($1200 for fall,winter and spring terms) is the maximum annual award amount for a full time student receiving the Oregon Opportunity Grant. I propose that the amounts of these awards be increased, particularly for the lowest income students (those receiving Federal Pell Grants or in households eligible for SNAP benefits).
What problem will this proposal address?	Many low income students are forced to take out federal student loans in order to cover living expenses as Federal Pell Grants have increased very little in past decade while the cost of living has risen dramatically. Students need to be able to pay for food and rent in order to remain students and complete their program. Oregon lags behind significantly in the amount of state grants offered to Oregon college students compared to Washington and California. Many low income students do not attend college at all as their financial aid offers do not give them sufficient resources to be able to do so. Underrepresented students benefit greatly from the Oregon Opportunity Grant, far more than the Oregon Promise Grant which primarily benefits higher income students.
What would be a successful outcome of your policy proposal?	More grant funding in the hands of Oregon college students would help those students both to complete their degree or certificate and to do so with less federal student loan debt.
How will you measure successful implementation?	More Oregon Opportunity Grant funds disbursed to more students would be a sign of success.
What is the timeline for implementation?	The 23-24 school year hopefully!
Which entities will be responsible for implementing this policy?	The legislature would need to authorize much greater funding for the Oregon Opportunity Grant program which is administered by OSAC under HECC.
What accountability measure(s) should be in place to ensure successful implementation?	No additional measures would be needed for increasing the award amounts. The same accountability measures that are already in place where the student's EFC (Estimated Family Contribution) on their FAFSA is used to determine their award eligibility as well as if they are half time or full time student would remain in place.

	If Oregon chooses to create a similar eligibility track like Washington's program of giving grants to students in households that are eligible for SNAP, this program also contains built in accountability measures since the steps for receiving SNAP benefits are stringent already.
Which existing statutes or programs will this policy affect?	The Oregon Opportunity Grant program
Do you have any additional questions or comments you would like to share with the Task Force?	Thank you for all your work on these important issues! Financial Aid can truly change students' lives by making it possible to attend school and earn a degree or certificate.

Submitter	Dylan DeLoe
Title of proposal	Recognizing Houseless Students and Families
Detailed description	Colleges and universities will designate a zone on-campus where houseless students may reside, and have access to showers without risk of being swept by law enforcement. This may be a dormitory hall, a parking zone for those in vehicles, or even space for tents. Basic Needs Navigators can register students to have access to these zones and help with access to other basic needs already on offer within each community.
What problem will this proposal address?	This policy will reduce harm to houseless students and their families, and give them a chance to succeed.

What would be a successful outcome of your policy proposal?	Success for this policy would mean that houseless students and their families have a consistent place to be, in relative safety, and are more likely to remain on their degree path to improve their socioeconomic standing.
How will you measure successful implementation?	By measuring how many students and family members are using the zone via registration with the Basic Needs Navigator. We may also measure the increase in other services rendered to said students, who may have not received services otherwise, such as financial aid, mental health counseling, food from campus/community food pantries, etc.
What is the timeline for implementation?	Oregon Colleges and Universities may take two quarter terms to designate a space and create a registration system upon passage.
Which entities will be responsible for implementing this policy?	Oregon Colleges and Universities may take two quarter terms to designate a space and create a registration system upon passage.
What accountability measure(s) should be in place to ensure successful implementation?	HECC will ensure funding for Basic Needs Navigators are continued so long as the college or university is serving houseless students through the program.
Which existing statutes or programs will this policy affect?	HECC will ensure funding for Basic Needs Navigators are continued so long as the college or university is serving houseless students through the program.
Do you have any additional questions or comments you would like to share with the Task Force?	HECC will ensure funding for Basic Needs Navigators are continued so long as the college or university is serving houseless students through the program.

Submitter	John Branam
Title of proposal	Increasing Postsecondary Access + Matriculation for Black, Brown & Low-income Oregonians
Detailed description	According to research, high school seniors who complete the FAFSA are 84% more likely to immediately enroll in postsecondary education, and for students in the lowest socioeconomic quintile, FAFSA completion is associated with a 127% increase in immediate college enrollment. To this end, it's deeply concerning that Oregon ranked 35th in FAFSA completion rates in 2022 (46% of 48K seniors), and had America's 10th highest decline in college matriculation in 2022 when compared to 2021. These numbers don't portend well for Oregon's future, especially as the need to further transform our economy into a high-skills, knowledge-based one has never been higher. To address this pernicious challenge and to supercharge the pursuit of postsecondary degrees in Oregon - and especially among Black, Brown, first-gen, immigrants and people from low-income families - we must think, and act, differently. We must move beyond traditional approaches to promoting higher-ed (although at present we barely do at all,) and supporting people from the aforementioned demographics in their pursuit. Our renewed effort must be bold, creative, empathic, original, targeted, personalized, in-person and digital, and scaled. Put another way, we must undertake a new, focused effort to provide personalized support - at scale - focused in particular on supporting financial aid including FAFSA/ORSAA completion and scholarship applications. Within this effort we must create compelling, youth-friendly, research-based, culturally-relevant digital content (youth live online - and especially youth-of-color) focused on FAFSA completion and postsecondary pursuit; develop incentive-based campaigns that

	supercharge engagement; and provide 1:1 advising and support to increase FAFSA/ORSAA completion. More specifically, our bold, arresting, one-of-a-kind statewide effort should include the following: ● Developing and deploying a youth-focused, primarily digital, statewide college-going campaign that promotes college, addresses summer melt, and seeks to re-engage stop-out students ● Promoting the consumption of digital content focused on: 1) valuing a postsecondary education; 2) believing they belong in college; 3) receiving personalized support through the application process; 4) completing the FAFSA; & 5) highlighting the Oregon Promise ● Providing personalized, virtual FAFSA support for up to 100% of OR's seniors ● Providing personalized, virtual support for up to 100% of OR's seniors' college application and scholarship essays ● Providing GS' research-based, youth-friendly, mobile-first, college-going digital content (that also highlight scholarships - which students love and that drive significant campaign engagement!) via email to OR educators/advisors to be shared directly w/ students ● Running a statewide textline for students to receive college-going content, check-ins, nudges and personalized support for juniors and seniors (support provided by a trained team of primarily Black and Brown first-gen staff, all of whom are trained in college + career advising practices, and are NCAN certified)
What problem will this proposal address?	All Oregonians - but especially Black, Brown, immigrant, first-gen and students from low-income families - complete the FAFSA and matriculate into two and four-year colleges at far lower rates than necessary to ensure Oregonians thrive, and to help lead our state into a next-generation economy. More specifically, Oregon ranked 35th in the US in FAFSA completion rates in 2022 (46% of 48K seniors). Four keys to students' successful navigation into a postsecondary institution include: 1) valuing a postsecondary education; 2) believing they belong in college; 3) receiving personalized support through the application process; and 4) completing the FAFSA/ORSAA.
What would be a successful outcome of your policy proposal?	● 10% increase in Oregon's FAFSA completion rate in 2025 (compared to 2022) ● 15% increase in Oregon's FAFSA completion rate in 2026 (compared to 2022) ● 20% increase in Oregon's FAFSA completion rate in 2027 (compared to 2022) ● 10% increase in Oregon's 2-year college matriculation rate in 2025 (") ● 15% increase in Oregon's 2-year college matriculation rate in 2026 (") ● 20% increase in Oregon's 2-year college matriculation rate in 2027 (")

	● 5% increase in Oregon's 4-year college matriculation rate in 2025 (") ● 8% increase in Oregon's 4-year college matriculation rate in 2026 (") ● 10% increase in Oregon's 4-year college matriculation rate in 2027 (") ● Disproportionately higher increases of college matriculation among target population
How will you measure successful implementation?	Implementation success will be evaluated by reviewing real-time statewide data on FAFSA/ORSAA completion, as well as statewide higher education data on 2 and 4-year college matriculation, compared to the goals articulated above.
What is the timeline for implementation?	The timeline for implementation would be driven by the timeline for funding. Assuming potential funds would not be available until late Oct. 2023, planning would happen between Nov. 1, 2023 and July 30, 2024, with implementation beginning on August, 1, 2024, and extending until June 30, 2027.
Which entities will be responsible for implementing this policy?	The organization(s) hired to implement the statewide effort.
What accountability measure(s) should be in place to ensure successful implementation?	● Quarterly check-ins by the OHECC. ● A comprehensive annual review of progress conducted by the OHECC.
Which existing statutes or programs will this policy affect?	None directly of which we are aware.
Do you have any additional questions or comments you would like to share with the Task Force?	No, but thank you for your consideration.

Submitter	
Title of proposal	
Detailed description	
What problem will this proposal address?	

What would be a successful outcome of your policy proposal?	
How will you measure successful implementation?	
What is the timeline for implementation?	
Which entities will be responsible for implementing this policy?	
What accountability measure(s) should be in place to ensure successful implementation?	
Which existing statutes or programs will this policy affect?	
Do you have any additional questions or comments you would like to share with the Task Force?	

Work Group 1 Survey: Financial Aid and Affordability

Survey recipients: 36
Survey responses: 18
Response rate: 50%

Support for Work Group Recommendations

Q: Which of the following recommendations do you support?

The task force recommends that the state expand its grant aid programs to cover a larger share of the cost of attendance for low-income and underrepresented students.

# of responses in support: 17
% responses in support: 94%

The task force recommends that the state revise its financial aid programs to accommodate the needs of working adults, who are becoming an increasingly large share of the student population across the state.

# of responses in support: 13
% responses in support: 72%

The task force recommends that efforts to promote financial literacy, completion of the FAFSA and ORSAA, and the long-term implications of student debt be expanded.

# of responses in support: 9
% responses in support: 50%

The task force recommends that the state address rising housing and child care costs, particularly in communities where large numbers of students reside.

# of responses in support: 12
% responses in support: 67%

The task force recommends that the state continue to invest in the benefits navigator program and to streamline the ability of students in higher education to access public assistance programs.

# of responses in support: 14
% responses in support: 78%

Support for Work Group Policy Proposals

Q: Using a scale from strongly disapprove to strongly approve, please rank the following proposals.

(Note: Proposals listed as "FA-#" were developed by work group members, while "SD-#" were developed by Senator Dembrow.)

Strongly disapprove = 1
Disapprove =2
Neutral = 3
Approve = 4
Strongly approve = 5

% responses in support = (# of scores greater than or equal to 4)/ (total responses)

FA-8: (HECC Funding Proposal) - Provide permanent funding for the Oregon Tribal Student Grant Program, fully funding the cost of attendance for enrolled members of one of Oregon's 9 federally-recognized tribes (currently a 1-year temporary program). ($40 million)

Average score: 4.56
% responses in support: 100%

HECC POP 201: Student Equity ($100,264,465)

Average score: 4.44
% responses in support: 94%

FA-9: (HECC Funding Proposal) - Increase funding for the Child Care Grant and issue grants to institutions to expand their child care services. ($4.2 million)

Average score: 4.39
% responses in support: 94%

SD-6: Join Washington in using SNAP eligibility as an automatic indicator of Oregon Opportunity Grant eligibility.

Average score: 4.33
% responses in support: 89%

FA-19: Create a statewide multi-prong campaign to improve FAFSA/ORSAA completion rates for Low-Income Oregonians and Oregonians of color.

Average score: 4.33
% responses in support: 83%

FA-10: Create permanent funding for a regular benefits navigator program at each institution.

Average score: 4.33
% responses in support: 78%

FA-7: (HECC Funding Proposal) - Expand the Oregon Opportunity Grant to fully fund the cost of attendance at a public college or university for all who meet need standard. ($700 million request)

Average score: 4.28
% responses in support: 89%

HECC POP 102: Oregon Opportunity Grant/Oregon Promise ($779,394,907)

Average score: 4.22
% responses in support: 83%

SD-4: Expand the Oregon Promise to include free tuition for eligible returning CC students along with those immediately out of high school.

Average score: 4.00
% responses in support: 78%

FA-6: Allow all credit students to qualify for the basic Oregon Health Plan.

Average score: 4.00
% responses in support:72%

HECC POP 202: Open Educational Resources ($2,415,600)

Average score: 3.83
% responses in support: 61%

FA-5: Create child care services at each institution.

Average score: 3.72
% responses in support: 67%

SD-8: Institute a required high school course in planning for post-graduation that would introduce students to post-secondary options, filling out the FAFSA/ORSA, and understanding and accessing resources.

Average score: 3.67
% responses in support: 67%

FA-4: Appropriating an additional $2 million to double the General Fund appropriation for Open Education Resources (producing low-cost or no-cost e-textbooks).

Average score: 3.67
% responses in support: 56%

HECC POP 103: ASPIRE/FAFSAA ($6,659,028)

Average score: 3.61
% responses in support: 61%

SD-3: Expand the Oregon Promise to include free tuition for Pell-eligible university students.

Average score: 3.61
% responses in support: 56%

FA-11: Allow families to lock in and pre-pay tuition in advance via monthly contributions to a 529 Savings Plan.

Average score: 3.61
% responses in support: 50%

SD-9: Incentivize high school graduation and post-secondary access by creating a fund that would deposit dollars into students' postsecondary accounts at the end of the 10th, 11th, and 12th grades as they successfully meet benchmarks for graduation (modeled after successful New Brunswick program).

Average score: 3.56
% responses in support: 56%

SD-2: End the Oregon Promise, incorporating its resources into the Oregon Opportunity Grant.

Average score: 3.50
% responses in support: 61%

FA-16: Expedite the local permitting process for affordable student housing.

Average score: 3.50
% responses in support: 50%

SD-5: Expand the Oregon Promise to include free tuition for eligible returning CC and university students along with those immediately out of high school.

Average score: 3.44
% responses in support: 50%

FA-15: Create a task force on student housing and the effect of student enrollment on local housing markets. Require all higher education institutions to report quarterly on the impact that student enrollment has on the local housing market.

Average score: 3.39
% responses in support: 39%

FA-13: Appropriate $3-$5 million to College Housing Northwest for additional housing supply and building maintenance.

Average score: 3.33
% responses in support: 50%

FA-12: Allocate $1 million to the Affordable Rents for College Students (ARCS) program, providing subsidized housing for students in the Portland metro area.

Average score: 3.33
% responses in support: 50%

FA-14: Direct universities to provide on-campus housing at a rate that is comparable to private rental housing.

Average score: 3.28
% responses in support: 50%

FA-3: Direct institutions to develop an electronic registration system that would allow students to see the cost of course textbook materials in addition to tuition.

Average score: 3.28
% responses in support: 44%

FA-2: Tax relief for homeowners and renters as a way to make housing more affordable for students.

Average score: 3.28
% responses in support: 44%

FA-18: Require all higher education institutions to designate a zone on campus where students experiencing homelessness may reside, camp, part vehicles, and shower without being at risk of removal.

Average score: 3.28
% responses in support: 39%

HECC POP 105: Oregon National Guard Education Grants ($4,080,000)

Average score: 3.22
% responses in support: 44%

SD-7: Merge the OOG, Oregon Promise, Tribal grant, and all other grant programs into a single program with a weighted formula for allocation based on Expected Family Contribution, first-gen status, degree path, etc.

Average score: 3.06
% responses in support: 28%

FA-1: Augmenting need-based aid with state-funded work-study options that would include work at designated non-profits.

Average score: 2.94
% responses in support: 28%

SD-1: Limit the Oregon Promise to students who are Pell eligible.

Average score: 2.83
% responses in support: 22%

Comments and Feedback

Q1: Which of the following recommendations do you support?

- I think 1 and 2 can work together in that all Oregonians should be eligible whether they are traditional aid students or adults coming back for additional training.
- The first recommendation is the most important.
- I support all the task force recommendations but have selected the top three I believe will have the largest impact across the State.
- The costs to students beyond tuition and fees are pushing many students out of higher ed. We need policy change that will support multiple programs to address these issues.

- While housing and child care are significant issues for students and all Oregon residents I would rather see funding go directly to cover the cost of higher education and fill financial aid gaps leaving more room in students' budgets to cover other costs.
- Keep efforts focused where they can do the most good, rather than trying to prioritize everything!

SD-1: Limit the Oregon Promise to students who are Pell eligible.

- "Although well-intentioned to focus funding from Oregon Promise grant toward lower income students, this could cause many issues with Oregon Promise becoming inaccessible to students who complete ORSAA rather than FAFSA and therefore cannot qualify for Pell.
- Additionally, there are many students who have just graduated from high school who have parents with incomes surpassing the limits for Pell eligibility in the middle income range, but those parents are unwilling or unable to provide any financial support to their young adult child as they transition to college. Therefore the young adult student is now living on whatever meager income they can make working a low wage job, and receives less financial aid due to their parents' income, despite that parental income not actually doing anything to support them in their basic needs. "
- Limiting eligibility to financial aid in turn limits the number of students in attendance, limits their completion rates, and leaves Oregon's workforce less educated. A student may not be eligible for Pell grants based on Estimated Family Income, which is a deeply flawed measure of cost burden.
- Limiting eligibility to financial aid in turn limits the number of students in attendance, limits their completion rates, and leaves Oregon's workforce less educated. A student may not be eligible for Pell grants based on Estimated Family Income, which is a deeply flawed measure of cost burden.
- If we put more money in we do not have to limit it!
- It should have an EFC/SAI cutoff but it should be higher than Pell. Or we should move to an AGI measure similar to Washington.
- I don't know that limiting Oregon Promise Grant to just Pell eligible students is best as there are many "middle income" families that are not Pell eligible. I would like to see more dollars spent on low and middle income students and less on high income (as Oregon Promise currently does).
- I would recommend adding a different metric for undocumented students who cannot apply for FASFA and therefore cannot prove Pell eligibility.
- It would be unfortunate to lose the power of the messaging behind OR Promise that every student will receive state support to attend a community college but the current model is inequitable.
- Pell Eligibility is only one indicator of need.

SD-2: End the Oregon Promise, incorporating its resources into the Oregon Opportunity Grant.

- This proposal would remove the short timeline after graduation that is currently inherent to Oregon Promise, but would create new barriers for undocumented and DACA students. Currently, undocumented status or DACA students are potentially eligible for Oregon Promise Grant as long as they complete an ORSAA and meet the timeline requirements. If Oregon Promise no longer exists, undocumented and DACA students would need to complete an ORSAA *and* meet additional special requirements in order to qualify for Oregon Opportunity Grant.
- From what I understand, the Oregon Opportunity Grant is eligible to more populations of students and rewards more money overall. Rolling over resources would be a good way to expand financial aid availability in the state.
- There should be one financial aid pot available to students no matter where they go...making one kind of school "free" even for those who do not need aid just does not make sense.
- We should have one State program.
- I have always held this opinion that Oregon Promise Grant dollars would be better spent in the Oregon Opportunity Grant fund.
- Strongly approve only if OOG opens up to non-credit students.
- This seems like a good practice to support streamlining of state aid, providing clarity for students, and reaching the students with the highest need while also giving them flexibility. That said, I am not knowledgeable about the possible back-end downsides to doing this.
- If the funding were increased to make sure that the lowest income students still had access to the same amount of funding as before.

SD-3: Expand the Oregon Promise to include free tuition for Pell-eligible university students.

- Although I have some concern regarding how this change could cause further drops in enrollment at community colleges in favor of four-year universities, I think this overall could be a beneficial change for Oregon students.
- Free tuition should be available to every student regardless.
- If we keep the Promise, this makes sense - but why not just combine per last question - - - this further bifurcation of student aid at a university confuses even more!
- Invest in OOG so this can happen. Adding OP to universities will just be confusing and difficult to administer.
- We would rather see Oregon have just one program, the Oregon Opportunity Grant that gives students the most flexibility and choice. Combatting confusion and too many options and similar programs creates confusion for students and families.
- I don't want Oregon Promise expanded as I would rather see the funding go to Oregon Opportunity Grants.

- Approve only if there are measures ensuring universities will not supplant grants/scholarships with Oregon Promise.

SD-4: Expand the Oregon Promise to include free tuition for eligible returning CC students along with those immediately out of high school.

- If the Oregon Promise is going to continue, it should cover more groups of students.
- I would rather see resources invested into OOG.
- Our most vulnerable and high-needs students often need more time to figure out a post-high school plan or to get organized to be able to attend school. They should not be penalized.
- If the Legislature keeps Oregon Promise, we fully support this change. This is especially important in our ability to serve students impacted by the pandemic form the class of 2020 + 2021

SD-5: Expand the Oregon Promise to include free tuition for eligible returning CC and university students along with those immediately out of high school.

- I would rather see the resources invested into OOG.
- I do not think Oregon Promise should be expanded to university students but rather funding should focus on Oregon Opportunity Grants.

SD-6: Join Washington in using SNAP eligibility as an automatic indicator of Oregon Opportunity Grant eligibility.

- SNAP eligibility status can change frequently based on small changes in a student's work income, which is common as students often adjust their work schedule each term to accommodate different class schedules. Additionally, it is currently quite difficult for college students to obtain initial eligibility for SNAP due to significant issues within the ODHS application processing systems. I do not want this to impact a student's eligibility for Oregon Opportunity Grant as well.
- There are lots of good aspects to this but it also sounds administratively quite complicated. Processes need to be simplified, not complicated further.
- And pair with the SNAP Training & Employment Program to offer wraparound supports and comprehensive career coaching.
- While we like the streamlined approach, I don't feel like I have enough information for an informed decision. However anywhere we can eliminate duplicate applications, forms and information families and students need to provide, we support.
- While we like the streamlined approach, I don't feel like I have enough information for an informed decision. However anywhere we can eliminate duplicate applications, forms and information families and students need to provide, we support.

SD-7: Merge the OOG, Oregon Promise, Tribal grant, and all other grant programs into a single program with a weighted formula for allocation based on Expected Family Contribution, first-gen status, degree path, etc.

- Similar concerns as comments I described regarding other proposals to merge OOG and Oregon Promise and the barriers that could create.
- Of course I approve - yahoo!
- It will be difficult to merge programs that cover different things. The biggest being the Tribal grant covering COA and the other programs not even being designed to try to cover COA. Other than the Tribal grant I would support this.
- I disagree with merging the tribal grant with the other grant programs. It will cause tribal students to lose significant funding.
- More information is needed on the wighted formula for dollar allocations.
- This seems positive for clarity, I'd want to ensure that we don't loose the focus on specific populations (tribal, student parents, etc.). Perhaps I just don't completely understand the proposal.
- I worry that this could be a burden for students to prove eligibility on all these fronts.

SD-8: Institute a required high school course in planning for post-graduation that would introduce students to post-secondary options, filling out the FAFSA/ORSA, and understanding and accessing resources.

- This should have been in place long ago. It should be timed to be completed in spring semester/trimester of 11th grade or fall semester/trimester of 12th grade. However, please ensure in this legislation that high schools are issued resources for adding this course--please do not ask k-12 school staff to do more without giving them more.
- A full course seems like a big ask in an already crowded high school career. Content within a class or mandatory workshops make more sense.
- Add in financial literacy curriculum.

SD-9: Incentivize high school graduation and post-secondary access by creating a fund that would deposit dollars into students' postsecondary accounts at the end of the 10th, 11th, and 12th grades as they successfully meet benchmarks for graduation (modeled after successful New Brunswick program).

- This sounds great in theory, but significant considerations need to be made for the following:
    - Students who may not meet grade level and credits-earned benchmarks at the same pace due to special education accommodations and modifications, but will complete these prior to graduation.
    - Students attending alternative high schools that may not adhere to a numerical grade levels system to measure student success and completion.

    - Students who leave school but achieve a GED independently or through a GED preparation program, such as what is offered at many community colleges."
- Lovely idea - funding factors and long term stability concerns
- As long as this would not take away from OOG investment.
- Sounds good but very administratively complicated and thus expensive for staffing.
- Would disproportionally support middle income families.
- This would be most beneficial to start much younger. This would help create a college-going culture in our schools and send the message that college can be for anyone.
- Nice idea, but I am concerned about too many different kinds of programs resulting in a confusion of under-funded options - rather than one clear, well-funded pathway for all.
- Would this take the place of other funding programs? This could benefit already privileged students more.

FA-1: Augmenting need-based aid with state-funded work-study options that would include work at designated non-profits.

- Students are already working far too many hours outside of their classes and struggling to focus on their studies as a result.
- Most of us have trouble spending our Federal work study. Would need to focus on students who normally would not get this funding (for instance, graduate students).
- Would the vetting of those nonprofits be onerous?
- Administratively complicated.
- Would be supplanting positions at non-profits with lower paid college student jobs.

FA-2: Tax relief for homeowners and renters as a way to make housing more affordable for students.

- This will not make a significant difference in housing affordability for students as rent rates continue to skyrocket.
- The details are important. For instance, the child tax credit that paid families every month made a huge impact on child poverty and it was not continued.
- Would not isolate supporting students, rather targets general Oregon population.

FA-3: Direct institutions to develop an electronic registration system that would allow students to see the cost of course textbook materials in addition to tuition.

- My son says almost all his books for college are on line now - not paying at all - - - really want more information on this as I think what we have may be out of date post-COVID
- I think we all pretty much do this already. I know textbooks are a hot topic to discuss but they are a very small percentage of the COA. In fact, it is the only component of COA that has gone down at OSU in the last decade. This is partly because of our focus on free and reduced cost textbooks.

- I believe this already occurs to some extent with the designation of low, no-cost textbook courses.
- This is a red herring. Cost of textbooks is certainly too high, but prioritizing this over housing or child care or tuition seems like a drop in the bucket.
- OMG please stop with the unfunded mandates! Institutions have way too many mandates that eat up the limited staffing we have.

FA-4: Appropriating an additional $2 million to double the General Fund appropriation for Open Education Resources (producing low-cost or no-cost e-textbooks).

- Again, a drop in the bucket of college costs. Housing is a far higher priority.
- Another nice idea, but would prefer to see us focus resources in fewer, better funded, programs.
- Unsure about the language, "additional." Their expansion request is $4.5 million for the 23-25 biennium, and that should be the amount for each biennium after as well. This program works, and saves students millions more dollars than are being put into it. Empower them to do more.
- Again - looking for more info on text book costs TODAY

FA-5: Create child care services at each institution.

- I am the daughter of a student parent, and I was a student parent myself. Available and affordable child care was absolutely a struggle both for my mother when I was a child, as well as for me when my son was little. Lack of access to affordable, convenient child care is a gender equity issue and must be addressed.
- I believe institutions should make that decision. I do think grant money available for schools that do might help
- Although this would be a good idea....unless child care is free or very low cost I don't think just having child care at each institution would help. When child care is offered at colleges/universities it is employees, not students who use it the most.
- Potential for mission creep and could lead to the cost getting passed to students and higher tuition costs. This could be addressed through early childhood initiatives.

FA-6: Allow all credit students to qualify for the basic Oregon Health Plan.

- I like the spirit behind this proposal, but I would advise revising the proposal to offer OHP coverage to any credit-earning student whose household income is under 250% of that year's federal poverty level. For 2022 this would mean those in a household of 1 who have less than $33,975 annual gross income, for a household of 3 the limit would be $57,575, and so on. This would act as an acknowledgement that some students may have a partner who is still earning a full time income while they are in school, but that the

student's lack of (or reduction) in earned income while attending school may cause strain on the household's finances.
- There also needs to be language specifying that students would not lose their OHP eligibility when taking the summer off from credit classes."
- Again - if only it were possible! We do not have the money to make this happen in a sustainable way
- Expand to non-credit students too.

FA-7: (HECC Funding Proposal) - Expand the Oregon Opportunity Grant to fully fund the cost of attendance at a public college or university for all who meet need standard. ($700 million request)

- I think this is a great proposal, but I would not want it to remove the requirement that students be enrolled at least half time. Students who enroll at less than half time status are far less likely to reach degree or certificate completion. A large expansion such as this should act as a enticement for students who previously would have enrolled for only one or two classes at a time due to needing to work full time outside school to decrease their work hours and engage more significantly with credit hours due to the financial security of expanded OOG.
- May me up there with finding unicorns...but I pledge to help you make it happen!
- This would be incredible but I think covering cost of attendance is a big jump. I would like to see us get to OOG covering tuition and fees first. Don't get me wrong, if we can get to COA that would be the best case.
- That seems like an unrealistically large leap from current grant amounts but it would be incredible for our students.
- Including non-credit students.
- I concur with the need to invest in the OOG but am concerned that the amount put forward by the HECC is not realistic and would cut into the support that institutions need to provide high quality postsecondary education.
- We are far behind other states in this area.

FA-8: (HECC Funding Proposal) - Provide permanent funding for the Oregon Tribal Student Grant Program, fully funding the cost of attendance for enrolled members of one of Oregon’s 9 federally-recognized tribes (currently a 1-year temporary program). ($40 million)

- We are nearly two centuries overdue in providing adequate reparations for the harm settlers did to the indigenous peoples of the land that is now Oregon. Ensuring tribal young adults and adults can pursue higher education without financial barriers is the least we can do to work toward that reparation.

FA-9: (HECC Funding Proposal) - Increase funding for the Child Care Grant and issue grants to institutions to expand their child care services. ($4.2 million)

- See answer to previous question - this is the way to address the child care issue

FA-10: Create permanent funding for a regular benefits navigator program at each institution.

- Colleges absolutely need a staff role outside of the financial aid office who is available to students to help them with basic needs insecurity situations. Some of the current Benefits Navigators are housed within their Student Affairs or Student Services departments, but I am especially inspired by the colleges that chose to house their Benefits Navigator position within their Equity, Diversity, and Inclusion department. Affordability and basic needs security is absolutely an equity and inclusion issue.
- I believe institutions should be doing this - on their own with their own resources
- We have had such a great experience with benefit navigators. Even if all they can do is get qualified students signed up for SNAP that is life changing for those students.

FA-11: Allow families to lock in and pre-pay tuition in advance via monthly contributions to a 529 Savings Plan.

- I don't know enough about the Oregon 529 system to be able to comment in depth on this, but I do like the idea of families being able to "lock in" present day tuition rates.
- I'd like more details. How far in advance can a family "lock in" a tuition rate? Is it scaled along a projected rate of inflation? How much money would it be possible to save as a family? Would they need to choose an institution at the time they lock in? What happens if the student goes to an institution outside of Oregon, or passes before tuition can be disbursed to institutions? Before they can attend?
- Also make the contributions tax-deductible
- Two of my kids went to college on 529 plans - help people help their kids!

FA-12: Allocate $1 million to the Affordable Rents for College Students (ARCS) program, providing subsidized housing for students in the Portland metro area.

- Although I admire the organization behind ARCS, these subsidies are not the answer to student housing affordability, because the foundational problems of absurd market rates for housing, and limited regulation about percentage increases in rent are not being addressed and will not be addressed by this action either. A million dollars is a lot of money, and yet it will only be able to subsidize housing for a few dozen students in a specific area of Oregon, while tens of thousands of other college students around the state will still struggle intensely with housing affordability, housing security, and homelessness.
- What about students elsewhere???

- The ARCS program is a positive example of providing subsidized housing to students experiencing or at risk of homelessness. However, rather than appropriating funding of this type to a specific nonprofit in a single geography, it would be more impactful to fund similar programs across the state at both higher ed institutions and nonprofits.
- I like all ideas for housing that don't require landlords to do something that hurts them. But let's dig deeper. I have floated the CULEX idea that I wish could be dug into y those smarter than me.
    - College/University Living Exchange (CULEX) - position as OSAC?
    - Student/family exchange
        - Direct (primary switch of kids - Corvallis home houses Portland kid, Portland kid's home houses corvallis kid - parents could know each other)
        - Indirect (secondary placement of kids like a clearinghouse - Corvallis home houses Portland kids but that Portland kid's home houses Ashland kid)
        - Host/Homestay (there is already a tax credit for this)
    - Corporate tax credit for investing in housing and providing at low cost
    - Public housing requirement for local governments
    - Residential assistance match (sabbatical, senior help, work exchange)
- Only benefits 100 students.

FA-13: Appropriate $3-$5 million to College Housing Northwest for additional housing supply and building maintenance.

- I would prefer to see a dollar amount like this be approved to create housing supply in other areas than just Portland. Even our students in smaller cities, towns, and rural areas are struggling with housing affordability and availability.
- What about the rest of us??
- This sounds good but I wonder how much benefit actually trickles down to how many students.
- I wish I had won the lottery - again, concerned about ability to sustain

FA-14: Direct universities to provide on-campus housing at a rate that is comparable to private rental housing.

- On campus housing should be less expensive than private rental housing!
- Not "comparable," it needs to be competitive, which means the price should be more affordable than private options.
- It's unclear how this proposal would actually help housing insecure or unhoused students. It seems to conflate policies and regulations set at the state and municipality level with college/university policies. A requirement to release the home address of every student living off campus is a huge invasion of privacy and does not seem to actually contribute to any of the proposal's goals.

- Competition good
- The challenge as I see it is they are two different products. Off campus housing does not have a standard they must meet, they don't provide RA's, they don't have counseling and support services, etc.
- How will universities fund this?

FA-15: Create a task force on student housing and the effect of student enrollment on local housing markets. Require all higher education institutions to report quarterly on the impact that student enrollment has on the local housing market.

- There is much work to be done in regards to student housing availability and affordability, but I'm uncomfortable with the language of this proposal that seems to lay blame on colleges and universities for strains on local housing markets. Particularly at community colleges, most students are already residents in the same community or within 30 miles, or at most move across the state to attend a community college that offers a program not available at a community college closer to their hometown. I don't like the suggestion that higher education institutions should need to spend staff time evaluating data on how much their student population may be impacting the local housing market. The responsibility should be in reverse-- why aren't cities and counties adequately supporting the colleges and universities that exist in their areas with available housing and regulations to ensure affordability?
- I like idea, but not reporting requirement - more we ask schools to do, more cost to them = more cost to student

FA-16: Expedite the local permitting process for affordable student housing.

- I don't know that this is the main barrier for creating more affordable housing for students. My understanding is that it is the cost to build as well as the limited access to funding (like LIHTC) for housing focused on college students.
- """Affordable"" is a deeply complex word in housing. In cities and counties it typically means housing units that rent at 75-80% of the ""market rate"" for standard rentals. If market rate for a 2 bedroom apartment in my city is $1,600 (and we presume that two students would share it as roommates, or as partners), new construction of 2 bedroom ""affordable"" units that are still $1,200-1,280 is nowhere near sufficient to meet these needs, no matter how quickly that housing can be permitted and constructed. On a weekly basis I receive contact from students looking for roommate situations who state they can only afford a maximum of $500/month for rent.
- A student working 20 hours/week at my local minimum wage of $13.50/hr earns $1,080 before any deductions, so likely takes home $950 or less per month. A renter is considered ""rent burdened"" if more than 30% of their income must be spent on rent each month. They are considered ""severely rent burdened"" if they must spend more than 50% of their income on housing each month. Thus, a student working 20 hours/week at minimum wage in my area would be rent burdened if they are paying more than about

$350/month in rent, and severely rent burdened if they are paying more than $500/month. A newly constructed ""affordable"" housing unit that is still $600+/month for half of an apartment is not, in fact, affordable regardless of the speed of permitting for that construction.

- These housing needs run far deeper than tiny incremental changes like expedited permitting processes. These needs require us to consider the very nature of what we consider ""affordable housing"" in our country. "

FA-18: Require all higher education institutions to designate a zone on campus where students experiencing homelessness may reside, camp, part vehicles, and shower without being at risk of removal.

- Colleges and universities should be providing better support to unhoused students. However, a "space" is poorly defined in this proposal, and several of the options would leave students experiencing homelessness. A more appropriate approach would be to fund college/university housing specifically set aside for this purpose rather than allowing parking areas or tent sites to fulfill this purpose.
- I serve many students who are homeless and who do not feel safe at local shelters, or are unable to secure open beds in shelters because they are at classes during the day and unable to get in line early enough to secure an available shelter bed for the next night. Many of these students are either on long wait lists for housing programs, or do not qualify for help getting into non-shelter housing within a reasonable timeline. These students deserve basic dignities and safety where they sleep at night, including access to bathroom and shower facilities, access to laundry facilities, ability to cook food, access to dish washing, etc. There also needs to be a dedicated case worker at each college to work with these students in a more extensive and longer-duration manner than the current benefits navigators are able to provide within their role. Alternatively, local organizations such as our state's community action organizations or housing authority offices need to step up and employ a housing case worker who specifically works with college students in their area who are experiencing homelessness and understands the unique needs of college students experiencing homelessness.
- Nightmare to make sure only students there - - - our goal should be for no homeless students and this gives up on that
- This is really interesting. I see challenges in keeping the space safe, clean, used only by students, etc.
- Questions concerning liability come up.

FA-19: Create a statewide multi-prong campaign to improve FAFSA/ORSAA completion rates for Low-Income Oregonians and Oregonians of color.

- OAICU pledges to do what we can to help!

HECC POP 102: Oregon Opportunity Grant/Oregon Promise ($779,394,907)

- Approve if expansion is granted to non-credit students
- See previous comment with concerns that proposed funding levels far exceed what the state could reasonably be expected to support.

HECC POP 201: Student Equity ($100,264,465)

- Funding may be too limited. An increase may be needed depending on formula for division of funds.
- It is hard to rank this when it is a holding POP for the recommendations that are currently being developed. Once those recommendations are firm, I feel like I could rank this question.

HECC POP 202: Open Educational Resources ($2,415,600)

- Strongly approve for this budget ask to be aligned with Open Oregon's "Significant Program Expansion" ask of a $4,558,400 CSL increase
- Course material affordability is a serious barrier to student success for students who do not have cash on hand to purchase expensive textbooks and course materials prior to the dates each term when financial aid disburses to students' accounts, which does not occur until the end of the second week of the term. This leaves many students unable to afford their course materials until at least the third week of the term, endangering their successful progress in their courses. This fall I received contact from a student whose textbook cost between two science courses was about $700- close to $350 per book. This is an outrageous amount of money to expect college students to be able to afford at any time, and especially prior to them having access to their financial aid disbursement.
- Open Oregon Educational Resources should see this number increased and made permanent.
- Want more info

Additional Questions

- Colleges could partner with Child care services in their area to pay for spots for students that would qualify for DHS supports as they will be adding students being covered soon
- Feedback form is fine. However, a whole lot of work still has to be done on all these proposals, so I hope anything that moves forward will still go through a thoughtful development process incorporating feedback from stakeholders, before emerging as an actual LC. And please, please - focus attention and energy on doing (and funding) a few things well; jettison the unfunded mandates that are killing us.
- I look forward to working with everyone. Let me know how I can assist in getting good policy passed in future phases. Thank you for the opportunity to give input.

1. FA-8: (HECC Funding Proposal) - Provide permanent funding for the Oregon Tribal Student Grant Program, fully funding the cost of attendance for enrolled members of one of Oregon's 9 federally-recognized tribes (currently a 1-year temporary program). ($40 million)
    a. Average score: 4.56
    b. % responses in support: 100%

2. HECC POP 201: Student Equity ($100,264,465)
    a. Average score: 4.44
    b. % responses in support: 94%

3. FA-9: (HECC Funding Proposal) - Increase funding for the Child Care Grant and issue grants to institutions to expand their child care services. ($4.2 million)
    a. Average score: 4.39
    b. % responses in support: 94%

4. SD-6: Join Washington in using SNAP eligibility as an automatic indicator of Oregon Opportunity Grant eligibility.
    a. Average score: 4.33
    b. % responses in support: 89%

5. FA-19: Create a statewide multi-prong campaign to improve FAFSA/ORSAA completion rates for Low-Income Oregonians and Oregonians of color.
    a. Average score: 4.33
    b. % responses in support: 83%

6. FA-10: Create permanent funding for a regular benefits navigator program at each institution.
    a. Average score: 4.33
    b. % responses in support: 78%

7. FA-7: (HECC Funding Proposal) - Expand the Oregon Opportunity Grant to fully fund the cost of attendance at a public college or university for all who meet need standard. ($700 million request)
    a. Average score: 4.28
    b. % responses in support: 89%

8. HECC POP 102: Oregon Opportunity Grant/Oregon Promise ($779,394,907)
    a. Average score: 4.22
    b. % responses in support: 83%

9. SD-4: Expand the Oregon Promise to include free tuition for eligible returning CC students along with those immediately out of high school.
    a. Average score: 4.00
    b. % responses in support: 78%

10. FA-6: Allow all credit students to qualify for the basic Oregon Health Plan.
    a. Average score: 4.00
    b. % responses in support:72%

Work Group 2: Student Support and Wraparound Services.

Submitted Policy Proposals

Work Group on Student Support and Wraparound Services

Policy Proposals Survey Results

Submitter	Rob Fullmer, IT Specialist, Portland State University
Title of proposal	Retention Grants: Extending the Last Mile
Detailed description	Monitor balance due for full-time Pell eligible students in good academic standing. Fund modest grants to those with outstanding balances (usually owed from fees, etc. for Pell eligible students) a week prior to the registration period so they can register for classes and continue their studies.
What problem will this proposal address?	Students who don't complete in many cases fail to do so due to relatively small amounts owed on their balance prior to registration. For some students who miss a term and disrupt their course map, they never return.
What would be a successful outcome of your policy proposal?	Increased retention of Pell eligible students.
How will you measure successful implementation?	More continuing students than before implementation - lower dropout rate, and higher graduation rates of targeted students.
What is the timeline for implementation?	Could be implemented quickly after passage, may require limited enterprise system work to reliably catch students with outstanding balances a few weeks before registration opens at some universities, but could be nearly completely automated.
Which entities will be responsible for implementing this policy?	Universities can implement this internally. Grant funds would be remitted directly to them to pay standing balances via student allocations, like Pell grants. Policy should be set at the HECC level on maximum small grant size, which shouldn't differ among institutions because of fee and tuition differences.
What accountability measure(s) should be in place to ensure successful implementation?	Term by term reporting on retention figures among students who receive grants versus those who do not, a thorough and verified communication program to students who qualify and are therefore eligible to participate.

Which existing statutes or programs will this policy affect?	Some universities (PSU for example) have had programs like this in place for students who are a few credits shy of graduating. This would extend the program to at least part-time students who are in good standing throughout their academic career and to all institutions.
Do you have any additional questions or comments you would like to share with the Task Force?	

Submitter	Robert Fullmer, SEIU 503, Staff, Portland State University
Title of proposal	Campus Coordinated Care
Detailed description	Each university would create a coordinated care network including all student support offices such as financial aid, undergraduate advising and counseling centers, registration, housing and financial advising, and any additional offered demographic specific supportive services, to coordinate and collaborate to provide full wraparound services enabling students to be successful in getting a degree. Assign each student a university liaison whose job it is to help them plug into the network and successfully navigate impediments.
What problem will this proposal address?	Improve retention and graduation rates at Oregon public universities, which have significant room for improvement at some institutions.
What would be a successful outcome of your policy proposal?	Graduation rates would improve steadily over time as the program is fully implemented.
How will you measure successful implementation?	Improving graduation rates, better retention, more positive experience for students, stronger institutional recommendations from alumni to others. Survey newly graduating students on their experience with the administrative offices they rely on for data.
What is the timeline for implementation?	The program would take a couple of years to stand up completely. It would involve some hiring to increase capacity, stakeholder convening and best practices coordination and implementation.
Which entities will be responsible for implementing this policy?	The HECC would be responsible for identifying best practices and working models at both in and out of state institutions and individual Oregon public universities would select and deploy the ones that were most apropos to theirs and implement.
What accountability measure(s) should be in place to ensure successful implementation?	The number of students served by the network, the participation level of critical student facing entities in the network, and the outcomes for students who utilize the service compared to similar students with whom the network was unable to connect.
Which existing statutes or programs will this policy affect?	There are analogous programs at some institutions that integrate some of these functions. Those programs would be able to expand with additional resources and focus. At other schools, putting a coordinated care network in place would mean essentially starting from scratch.

Do you have any additional questions or comments you would like to share with the Task Force?	

Submitter	Kimberly Johnson, Vice Provost for Undergraduate Education and Student Success, University of Oregon
Title of proposal	Equity Achievement Act
Detailed description	I represented the University of Oregon in developing our priorities and needs around wrap around services to address systemic inequities, barriers, and provide holistic, culturally competent, and relevant supports. Please see the Equity Achievement proposal for details.
What problem will this proposal address?	Oregon institutions struggle to sufficiently and holistically serve our underrepresented and marginalized communities as we continue with the systems that are one size fits all. This disconnect is caused by a variety of historical factors and exacerbated by underrepresented students gaining limited access to financial resources and social capital such as mentoring and professional networks. Unfortunately, these inequitable opportunities produce a compounding effect, resulting in not only reduced persistence and graduation rates, but also fewer career opportunities, lower salaries, and less opportunity for future generations to access privileged, yet invisible social benefits. Through targeted funding to support wrap around services, institutions will be able to amplify efforts to address the disparities in college access, retention, and graduation outcomes; and give our institutions an opportunity to expand offerings to appropriately scale in these areas that have stayed resource stagnate. Oregon institutions have many programs that address these issues, but have stayed small/stagnate in size. For the University of Oregon, our FTE toward evidenced based practices have barely advanced since the early 80's and 90's in terms of staffing, yet our populations have increasingly diversified. This is a challenge across all our institutions as they struggle to focus on one size fits all, and not directly addressing consistent and persistent retention and graduation gaps. If we are serious about making change we must invest in evidence based practices that have been proven to make change, and at a larger scale.

What would be a successful outcome of your policy proposal?	Integrated comprehensive wraparound programs link students to necessary holistic resources and reduce institutional barriers to success. This approach creates an environment within the larger university to explicitly address the needs of our underrepresented student population and promote student success. Connected resources and programs also support whole students recognizing our students' intersectionality without compartmentalizing their identities and experiences. With investments we will not only see more students being retained and graduating, but more students who are thriving at their institutions and not just surviving. A successful outcome would be more staffing and programmatic fund support in order to more robustly reach an increasingly diverse population.
How will you measure successful implementation?	Each institution should be able to track participation, outreach, and gains around recruitment, retention, persistence, graduation outcomes, and with added investments--post graduation career outcomes data. Climate surveys, Student Experience and Research Universities surveys, and other measures should also address the collection and assessment of student feedback and sense of belonging. The ultimate successful implementation are increased supports to students and engagement in activities that lead to the student success strategy the campuses employ.
What is the timeline for implementation?	It is critical to have short and long term planning. It requires the hiring and training and development, along with a campus culture shift as each new cohort enters. You need at minimum a year to hire, train, deploy expanded strategies, before you can even assess impact of first term retention.
Which entities will be responsible for implementing this policy?	While each campus is different, it is critical this involves the entire campus leadership structure in addition to the portfolio areas that oversee the work. The President and Provost at the highest level should set the charge and mandate, and units like Student Success, Advising, Student Life, etc are responsible in leadership to oversee. For the University of Oregon it would be my role in Student Success to ensure the policy.
What accountability measure(s) should be in place to ensure successful implementation?	See the proposal
Which existing statutes or programs will this policy affect?	See the proposal

Do you have any additional questions or comments you would like to share with the Task Force?	

Submitter	Veronica Dujon, Oregon Higher Education Coordinating Commission
Title of proposal	Single Point Entry and Engagement for Continuous Integrated Service Provision
Detailed description	The objective is to build a framework for an integrated system of service provision that starts in high school. It should be proactive in engaging students, shifting the responsibility from students to institutions to ensure that students benefit from services that attend to their needs. This policy would focus on cross-sector structural and process innovations that leverage successful/proven individual program elements and treatments to fit into a comprehensive strategy supporting the whole student.
What problem will this proposal address?	Students are often required to be proactive in finding out about and leveraging services and resources that would support their successful academic journeys. Students are required to be proactive in searching them out, but they report how substantial barriers can be in doing so. The way students find out about services is disjointed, can be hit or miss, and when they do learn of these supports they too often have to negotiate across several and and spend inordinate. The time spent on these activities are not only stressful but are a significant distraction on the academic part of their investments.
What would be a successful outcome of your policy proposal?	Students who enter the post secondary sector have successful, affirming experiences right through to completion and the workforce because they can easily access cross-sector wraparound services as they need them.
How will you measure successful implementation?	The ease of access to services and advising that underserved students experience during their academic careers. This success can be measured with student surveys at different points in their journey and in the increase in the number of students who are recruited, retained and who graduate with appropriate skills to thrive in the workforce.
What is the timeline for implementation?	Implementation to begin in 2023-25 with full implementation in 4-6 years
Which entities will be responsible for implementing this policy?	ODE and HECC in collaboration with the 24 post secondary institutions

What accountability measure(s) should be in place to ensure successful implementation?	Regular progress reports
Which existing statutes or programs will this policy affect?	???
Do you have any additional questions or comments you would like to share with the Task Force?	

Submitter	Sage Learn, Government Relations Director, Portland Community College
Title of proposal	Effective Student Support and Wraparound Services Policy Priorities
Detailed description	Funding in this area focuses on programs and changes to education delivery that have shown results, this could be delivered through a block grant that supports the types of programs detailed below, so that colleges could utilize the programs that will be most impactful for their regions and demographics served. - Comprehensive programs for first-generation and underserved students, including outreach to high schools, coaching and stipends. Example: Future Connect -Academic coaching and accelerate transition to guided pathways model creating clear educational pathways for students significantly increasing completion rates and time to certificate or degree -Mentoring, establishment of cohort learning models when appropriate Bridging the digital divide through technology stipends and grants for at-home broadband service and virtual learning training for faculty -Expansion of CTE and Career Pathways programs that include coaching models and holistic supports for learners -Increased supports for disability services, such as SB1001 from 2017 -Support for Adult Basic Education (ABE), GED, and English for Speakers of Other Languages (ESOL): expand and make permanent ABE support services and support transition specialists, GED test vouchers, GED practice tests, free GED testing and no-cost, no-grade refresher courses in English and math and expansion of Integrated Education & Training (IET)
What problem will this proposal address?	These policies if funded would support programs and changes to education delivery and student support that have shown results in achieving greater equity and access for student success.
What would be a successful outcome of your policy proposal?	Legislation that provides such sums as needed to support programs and delivery methods that show equity and student success for higher education.
How will you measure successful implementation?	Monitoring enrollment and completion rates for underserved communities if adequate funding is provided to gauge impact and/or using previous data and accountability methods from successful programs.

What is the timeline for implementation?	The need is for ongoing funding, but at a minimum 2-5 year completion rates to effectively capacity build, implement and collect data.
Which entities will be responsible for implementing this policy?	Higher education entities, with a focus on community colleges
What accountability measure(s) should be in place to ensure successful implementation?	Reporting measures/timelines should be on the existing reporting cycles for colleges to effectively align data collection.
Which existing statutes or programs will this policy affect?	Existing programs would be able to grow capacity and services: -First-generation student support (Future Connect) -Academic coaching and guided pathways -Career Pathways -Disability services -Adult Basic Education, English for Speakers of Other Language and Integrated Education & Training
Do you have any additional questions or comments you would like to share with the Task Force?	What type of supplemental resources will be most helpful to the Task Force?

Submitter	Matt Bisek, Executive Director, Oregon TRIO Association
Title of proposal	Oregon TRIO Association – College Access Sustainability and Growth
Detailed description	This policy proposal seeks the continued investment from the state budget in the Oregon TRIO Association of $500,000 annually. In the last Biennium, under HB 2412 & HB 5006, the state committed to supporting college access for underrepresented students. These funds will support the continued operations of current TRIO programs, seek to create new opportunities for our 10,000+ students, and attempt to increase the number of TRIO grants in Oregon through community partnerships. Oregon TRIO Association represents the connective tissue between secondary schools, institutions of higher education, and workplace employers. Each of these individual areas provides remarkable opportunities as we aim to transform our youth into productive working citizens. However, the transitionary spaces between each of those entities are a crucial area where many students lack guidance and knowledge to navigate these systems. TRIO has demonstrated for over half a century that we are capable of developing relationships with underrepresented students to help successfully navigate those transitions. From middle school through adult learners, TRIO can bridge the gap between education and employment to ensure that all students have equal opportunities for success.
What problem will this proposal address?	A postsecondary degree is often considered the most reliable path to socio-economic stability, mobility, debt management, and asset wealth in the United States. However, education costs have skyrocketed, with tuition and fees rising four times faster than median incomes, and federal need-based financial aid has failed to keep pace. Fourteen percent of the U.S. population is food insecure; at least half a million are homeless; and infant care costs single-family households 36% of their incomes on average (King, 2021). This, compounded with an affordable housing crisis and the COVID-19 pandemic, leaves millions of students with unmet financial needs and causes them to struggle to afford adequate food, housing, and child care prior to enrollment in a postsecondary institution. Adverse effects on student retention and graduation rates for U.S. state economies link to these basic needs shortages. Students who are low-income and/or come from low-income households are the most at risk of not attaining a postsecondary degree and are the least likely to succeed in the U.S. and global economies.

	Basic needs shortages in the state of Oregon negatively affect student academic performance, mental and physical health, attendance, and retention rates. These basic needs stressors have disproportionally affected Oregon students from marginalized populations, such as those identifying as BIPOC, parenting, non-cisgender, former foster youth, the mentally and physically disabled, and first-generation. Their disparities often intersect, and low income is the common denominator among those most affected. Facing food and housing insecurities while pursuing a high school diploma or college degree is often correlated with a decline in mental and physical health fueled by negative stigmatization. According to the 2020 U.S. Census, 90.7% of Oregon residents have graduated from high school, only 33.7% have attained a postsecondary degree, and 11% are experiencing poverty. State funds will go toward improving these conditions through investment in Oregon TRIO Association's services which support, enhance, and sustain Oregon's TRIO programs. Oregon TRIO Association (OTA) seeks to remedy barriers to attaining a postsecondary degree by being a catalyst in Oregon for progressive initiatives that promote educational equity, access, and opportunity for traditionally marginalized student populations. Through our services and TRIO programs, we ensure that all TRIO students in Oregon have the resources and tools needed to access their educational and career goals. OTA's TRIO programs assist over 10,000 Oregon students annually with career exploration, college admissions, college preparation, financial aid, scholarships, college retention, and graduation. OTA TRIO programs increase the number of low-income, first-generation, underrepresented, BIPOC, and disabled student populations in higher education. 7,981 OTA TRIO students (70.32%) are low-Income and first-generation students (LIFG). Additionally, there are currently no entities working on behalf of our entire state to pursue additional TRIO grant funding. Each grantee is motivated to complete their objectives and write to maintain their grant. Oregon TRIO Association can identify unserved populations that could benefit from TRIO programs and services, working with community partners to help pursue new grants during competition years. Sources:

	1. "The Great Student Squeeze: Skyrocketing Costs and Unmet Basic Needs Are Impacting Student Success: Implications for Oregon" (King, 2021). 2. U.S. Census Bureau, Oregon, Quickfacts
What would be a successful outcome of your policy proposal?	Successful outcomes for this policy proposal include significant increases (10%-20%) in the number of TRIO grants in Oregon and the number of students served over the next five years. Oregon TRIO Association's (OTA) mission is to increase the number of low-income, first-generation, underrepresented, BIPOC, and disabled student populations in higher education. OTA advocates for its TRIO programs and students at the U.S. Congressional level, provides professional development opportunities for members and students, connects students to community resources, offers grant writing support to ensure the sustainability of its programs by the U.S. Department of Education, and seeks to expand TRIO programs into populations that could benefit from our services. TRIO programs were the first national college access and retention programs to address the dire state of social and cultural barriers to education in the U.S. In 1964. TRIO began as part of President Lyndon B. Johnson's War on Poverty after the Educational Opportunity Act of 1964 established an experimental program called Upward Bound. In 1965, the Higher Education Act created the Talent Search program. In 1968, another program, Special Services for Disadvantaged Students (later known as Student Support Services) launched, and the term "TRIO" defined these federally funded programs. The trio of programs gained notoriety for encouraging access to higher education for low-income students. By 1998, TRIO programs had become a vital pipeline to opportunity, serving traditional students, displaced workers, and veterans. The original three programs had grown to nine, adding Educational Opportunity Centers and Veterans Upward Bound in 1972, Training Program for Federal TRIO programs in 1976, the Ronald E. McNair Post-Baccalaureate Achievement Program in 1986, Upward Bound Math/Science in 1990, the TRIO Dissemination Partnership in 1998, and finally, the Omnibus Consolidated Appropriations Act of 2001 amended the Student Support Services (SSS) program to permit the use of program funds for direct financial assistance (aka Grant Aid) for current SSS participants who are receiving Federal Pell Grants. Today, OTA and its TRIO programs serve over 10,000 students annually in forty-seven projects across Oregon's five districts. Our

	primary goal is to increase the number of TRIO students served in Oregon by applying for new TRIO grants throughout the state. Current OTA activities include: (1) Hosting a yearly professional development conference that provides training and networking opportunities to TRIO professionals throughout the state. (2) Organizing an annual Student Leadership Conference (SLC) designed to develop essential leadership skills in students for their future success. (3) Providing a virtual network for programs and students to connect during the pandemic and hosting our annual conferences virtually. (4) Working statewide with non-profit organizations and educational institutions to identify communities with a high need for TRIO programs and aiding in pursuing those opportunities. (5) Identifying the unmet financial needs of our TRIO programs and securing funding to provide opportunities and remove barriers to serve TRIO students better. Examples of this include International educational opportunities, "The Last Mile Scholarship" which aids students in their 5th or 6th year of college, and paid internships.
How will you measure successful implementation?	Measurements for successful implementation include: increasing the number of TRIO grants in Oregon by 10-20% over the next five years, increasing the number of students served in Oregon by 10-20% over the next five years, and collecting the outcome-based data collected by each of our grants. OTA supports, facilitates, and sustains 47 TRIO projects/programs/grants in Oregon. Twenty-three are Student Support Services (SSS) programs. Ten are Upward Bound (U.B.) programs. Ten are Educational Talent Search (T.S., ETS) programs. Three are McNair programs. There is one Educational Opportunity Center (EOC) program. OTA TRIO program outcomes include: Our ETS program identifies and assists individuals from disadvantaged backgrounds who have the potential to succeed in higher education. Its goal is to increase the number of youths from disadvantaged backgrounds who complete high school to enroll in and complete their postsecondary education. The program is for students who are: limited English proficiency, from groups traditionally underrepresented in postsecondary education, disabled, homeless, and/or in the foster care system. There are over 6,000 students in our ETS program. The rate of non-senior ETS students persisting to the next grade level equals 95.14%. The rate of ETS seniors completing the FAFSA equals 74.40%. The rate of ETS seniors graduating with a rigorous curriculum equals 56.79%. The high school graduation rate of

	ETS students equals 95.41%. The college enrollment rate for ETS students equals 64.70%. The rate of 2013-14 ETS cohort college enrollees graduating in six years equals 43.41%. Our SSS program provides opportunities for academic development, assists students with basic college requirements, and motivates them toward successfully completing their postsecondary education. SSS may provide grant aid to current SSS participants receiving Federal Pell Grants. SSS aims to increase the college retention and graduation rates of its participants. SSS programs support current college students and serve LIFG students and students with disabilities to complete a postsecondary education program. The total number of SSS 2-Year/4-Year students equals 2032. Their college retention rates equal 70.81% for 2-year students and 92.28% for 4-year students. Their graduation rates equal 44.50% for 2-year students and 61.70% for 4-year students. Our TRIO Upward Bound (U.B.) programs support participants in their preparation for college entrance. These programs serve: high school students from low-income families, veterans, and high school students from families in which neither parent holds a bachelor's degree. Our Upward Bound programs comprise 672 students. The benchmark completion rate of UB TRIO students from the UB TRIO program is 83%. The rate of U.B. seniors graduating with a rigorous curriculum equals 72.30%. Their high school graduation rate is 99.20%. The college enrollment rate for U.B. students is 75.80%. The rate of 2013-14 cohort college enrollees graduating in six years is 41.90%. Our McNair program prepares participants for doctoral studies through involvement in research and other scholarly activities and serves students from disadvantaged backgrounds who have demonstrated strong academic potential. The McNair program supports 87 students. The program's rate of students completing research/ other scholarly activities equals 93%. The program's graduate school enrollment rate equals 51.50%, and its continued enrollment in graduate school rate equals 96%. Its Doctoral Degree attainment rate equals 14.10%. The Educational Opportunity Center program provides counseling and information on college admissions to qualified adults who want to enter or continue a program of postsecondary education. The program also provides services to improve participants' financial and economic literacy. An essential objective of the

	program is to counsel participants on financial aid options, including basic financial planning skills, and to assist in the application process. The goal of the EOC program is to increase the number of adult participants who enroll in postsecondary education institutions. The TRIO program outcomes data provided is from the 2020-2021 academic school year.
What is the timeline for implementation?	The timeline would be for the next biennium budget of 2023-2025. Oregon TRIO Association is already operational and is seeking continued funding. Federal TRIO grants cycles are five years, with new competitions beginning at the end of each grant cycle. The Oregon TRIO Association is seeking to increase the number of grants, but a year-to-year comparison will not represent the impact to maintain and add programs in Oregon. A 5-year measurement cycle is ideal to demonstrate the impact of our efforts.
Which entities will be responsible for implementing this policy?	The primary entity is the Oregon TRIO Association. OSAC is our grantor and is responsible for oversight and direct reporting. Additionally, the partner institutions and community organizations are secondary partners as they are the current TRIO grant holders. Therefore, cooperation between these institutions and organizations will be necessary to implement this policy effectively.
What accountability measure(s) should be in place to ensure successful implementation?	The Oregon TRIO Association will collect performance and narrative data to demonstrate the effective implementation of this policy. Performance data will be collected using the metrics identified in the question "How will you measure successful implementation." Oregon TRIO grant member surveys will collect narrative data on the effectiveness of Oregon TRIO Associations' efforts to support their program. Oregon TRIO Association will also submit annual reports to the state (OSAC) regarding financial reporting and budget narratives.
Which existing statutes or programs will this policy affect?	This proposed policy is a continuation of HB 2412 and HB 5006. This policy is also an aide to the Higher Education Coordinating Commission's educational attainment goals. Those goals stated that by 2025, 40% of Oregonians will complete a 4-year degree, 40% of Oregonians will complete a 2-year degree or certificate, and 20% will earn a high school diploma or the equivalent.

Do you have any additional questions or comments you would like to share with the Task Force?	

Submitter	Elizabeth Cox Brand, Exec Dir, Student Success Center at the Oregon Community College Association
Title of proposal	Oregon Guided Pathways
Detailed description	The Pathways Model is an integrated, institution-wide approach to student success based on intentionally designed, clear, coherent and structured educational experiences, informed by available evidence, that guide each student effectively and efficiently from her/his point of entry through to attainment of high-quality postsecondary credentials and careers with value in the labor market. Ultimately, this project is meant to help increase completion rates and student achievement across Oregon.
What problem will this proposal address?	Low student persistence and completion rates in Oregon community colleges, particularly for historically marginalized populations.
What would be a successful outcome of your policy proposal?	Legislative funding to support the ongoing work of scaling guided pathways in all Oregon community colleges.
How will you measure successful implementation?	The Oregon community colleges have been tracking Early Momentum Metrics (EMM) that are leading indicators of student success. As of 2022, the Oregon Student Success Center (OSSC) has EMM data from all 17 community colleges that goes back more than a decade. Successful scaling of guided pathways would be present by increases in the EMMs for various student indicators.
What is the timeline for implementation?	The Oregon community colleges, through facilitation of the OSSC, have been working to implement guided pathways since 2018. According to research by the Community College Research Center at Columbia University, with sustained funding and institutional efforts, it takes a minimum of 10 years for a college to fully implement the guided pathways framework.
Which entities will be responsible for implementing this policy?	All 17 of Oregon's community colleges with the assistance of the OSSC at the Oregon Community College Association (OCCA).
What accountability measure(s) should be in place to ensure successful implementation?	Continued tracking and analyses of the EMM data is one measure for accountability.

Which existing statutes or programs will this policy affect?	This policy would impact all programs and practices at all Oregon community colleges.
Do you have any additional questions or comments you would like to share with the Task Force?	Oregon community colleges have been self-funding this transformational work since its inception. Other state legislators have funded these types of efforts across the country and that type of support would help our colleges reach scale much faster.

Submitter	Elizabeth Cox Brand, Exec Dir, Student Success Center at the Oregon Community College Association
Title of proposal	Corequisite Course Implementation at Oregon community colleges
Detailed description	Corequisite courses offer an effective alternative to unnecessary systemic barriers such as long developmental course sequences. Students are placed in college-level English or Math upon entering community college, while also getting extra support to learn and understand the curriculum. The corequisite course provides background knowledge, reviews material, and previews upcoming topics. This strategy builds on Oregon's existing student success efforts, such as Guided Pathways and Math Pathways, and has been shown to dramatically increase pass rates. For faculty, administrators, and advisors who have been immersed in that work, this is not something totally new, it's a logical next step in student-focused practices. This policy would seek legislative support in the way of funding to support and incentivize community colleges to implement and scale corequisite courses in Math and English.
What problem will this proposal address?	Currently many students—including a disproportionate number of historically underserved populations—are placed in pre-requisite developmental courses, which are characterized by low pass rates and low persistence rates. When students are placed into these remedial prerequisites, it can prevent them from building the momentum they need to earn their credential. These students are more likely to rack up debt taking multiple terms of prerequisites and drop out. Prerequisites are one of many systemic barriers that particularly impact those who have already been marginalized by our education system, including students who are: Black Indigenous People of color Immigrants Migrants From rural areas Experiencing poverty The data shows more students succeed with supports from corequisites.

What would be a successful outcome of your policy proposal?	Legislative funding would be appropriated to help community college implement and scale corequisite courses in English and Math. This funding could be used to offset the cost of faculty time needed to redesign curriculum, purchase technical assistance and professional development for faculty, staff time for updating learning management systems and scheduling software, and help ease the fiscal burden due to lost FTE to the colleges when fully implementing corequisite courses.
How will you measure successful implementation?	Early Momentum Metrics (EMMs) have been collected by the Oregon Student Success Center (OSSC) from all 17 community colleges for the past two years. These metrics, designed by the Community College Research Center at Columbia University, are leading indicators showing changes in student success metrics during a student's first academic year. Two of these metrics are completion of college-level Math, completion of college-level English, and completion of both in the first academic year.
What is the timeline for implementation?	Starting with a grant in fall 2020, Oregon community colleges have been developing corequisite Math courses for Math 105, Math 111, and Math 243. As of fall 2022, 11 community colleges are offering corequisites in one or more of those courses. This policy would assist those 11 colleges in scaling their efforts while also creating opportunity to bring the remaining seven colleges on board. This policy would also assist in scaling current efforts in several colleges of English/Writing corequisite courses. Funding from this policy would accelerate scaling of corequisite courses in Oregon community colleges.
Which entities will be responsible for implementing this policy?	All 17 Oregon community colleges with the coordination of the OSSC at the Oregon Community College Association.
What accountability measure(s) should be in place to ensure successful implementation?	Early Momentum Metrics (EMMs) have been collected by the Oregon Student Success Center (OSSC) from all 17 community colleges for the past two years. These metrics, designed by the Community College Research Center at Columbia University, are leading indicators showing changes in student success metrics during a student's first academic year. Two of these metrics are completion of college-level Math, completion of college-level English, and completion of both in the first academic year. Upward trajectory of these metrics may be an accountability measure.

Which existing statutes or programs will this policy affect?	Pre-requisite remedial coursework for Math and English at all Oregon community colleges.
Do you have any additional questions or comments you would like to share with the Task Force?	The grant funding that helped launch this work was only one year. Since then, the Oregon Presidents' Council (OPC) has dedicated strategic funds to support the continued implementation efforts.

Submitter	Jerrel Brown, Oregon Student Association, Facilitator of Disability Justice Task Force at OSA
Title of proposal	Disability Justice Action Plan for Oregon Higher Education
Detailed description	The Legislature will mandate the creation of a Committee on Disability Justice in Higher Education. The committee will develop a statewide action plan to make higher education institutions more accessible, accommodating, and safe for disabled students. The Higher Education Coordinating Commission (HECC) shall support the creation and management of the committee. The Committee shall include membership of impacted communities and relevant stakeholders including disabled students, faculty, staff, social workers, and accessibility professionals. The committee shall include diverse representation with members with intersecting impacted identities, including: queer folks, immigrants, disabled folks, BIPOC folks. The plan shall identify existing disability accommodations and identify gaps across the state. Further, it shall include solutions to issues impacting disabled students across higher education institutions in Oregon. This requires adding 2 FTE positions at the HECC to staff the committee, lead research, and develop the statewide action plan. This committee shall take on issues including, but not limited to, those listed below: Accessing Disability Accommodations: Higher Education institutions should provide disability evaluations for students free of cost to be able to access accommodations. Ensure each student enrolled at a community college or public university has the right to request: (a) For a student who does not have a section 504 plan, that the community college or public university conduct an evaluation to determine whether the student should have a section 504 plan; or (b) For a student who has a section 504 plan, that the community college or public university conduct a review of the section 504 plan. A community college or public university: May, instead of conducting an evaluation, develop a section 504 plan using documentation that demonstrates the student had a disability during high school. The institution will not charge a student a fee for conducting an evaluation. In developing a section 504 plan, a community college or public university must allow a student to have assistance from support personnel, including but not limited to parents, guardians or other persons

	knowledgeable in the development and review of section 504 plans. Streamline and Strengthen Disability Accommodations Across the State: -Investment in universal system for higher education institutions/instructors to access accommodation information for students across the state. -Due to the highly individualized/unique needs of Disabled folks across the board accommodations need to be on a case by case basis and tailored to the students needs specifically. -It shall include explicit protections of the status of invisible disabilities and associated accommodations. Modify credit requirements for disabled students including: *Maintaining status as a student *Accessing state financial aid *Full time status credit requirements *Degree completion timeline *Accessing government disability benefits including tax-credit/Section 8/affordable housing programs Identify needs for investments across Oregon institutions in: Making speech-to-text technology easily accessible for students to complete assignments Implementing Accommodations -Identify how to instate mandatory DEI training for admin/staff/faculty to prep them to address the intersecting issues associated with Abelist barriers in Higher Ed (i.e. the intersection of patriarchy and ableism, Racism and ableism, xenophobia and ableism, ETC.) *Must include content surrounding discriminatory harassment, ableist microaggressions and sharing confidential information about a student's diagnosis or struggles in front of the class/in the presence of students *Must include content surrounding social shaming of students with non-heteronormative life trajectories (i.e. The shaming of single and/or asexual disabled students and attributing their different life-trajectory to their level of social functioning.) -How to honor reasonable accommodations for disabled students Each community college and public university shall establish procedural safeguards for students with disabilities ensuring that: (a) The community college or public university’s no-discrimination statements, disability access information, grievance procedures

	and other disability-related policies are current, publicly available and widely distributed; (b) Services, activities and facilities are accessible to, and usable by, students with disabilities; (c) Faculty and staff understand their responsibilities under section 504 of the Rehabilitation Act, 29 U.S.C. 794; (d) There is a system at each community college and public university for responding to disability concerns in a timely and appropriate manner; (e) There are consistent procedures in place for students with disabilities regarding the referral, evaluation and implementation of section 504 plans; (f) Faculty and staff are informed about developments in both recommended educational interventions and legal requirements for students with disabilities; (g) Faculty and staff are provided with training for interactions with students with disabilities; (h) A formal complaint process and grievance policy are in place for students with disabilities; and (i) The complaint process and grievance policy required under paragraph (h) of this subsection require prompt and impartial investigations into complaints made by students with disabilities and that complainants are notified of the outcomes of these investigations. Campus security training for interacting with disabled students Almost half of the people who die at the hands of police have some kind of disability, according to a new report, as officers are often drawn into emergencies where urgent care may be more appropriate than lethal force. (Source)
What problem will this proposal address?	This policy proposal will solve the issue of disabled students not being provided access to reasonable accommodations during their journey through higher education due to the financial and institutional barriers that make acquiring necessary evaluations that Higher education institutions used to decide what accommodations are acceptable for each student. This policy starts the process of streamlining and strengthening disability accommodations across Oregon. As it stands there is no standard state wide for students accessing disability accommodations or institutions implementing disability accommodations. There also is no standardization for what accommodations look like from campus to campus. This is problematic as students move from one institution their accommodations do not follow them, so they must figure out the

	application process for receiving disability accommodations at their new campus, and hope that the accommodations offered will work for their specific needs. The current iteration of disability accommodations do not go far enough to provide true useful support to ensure that our disabled students in Oregon have everything they need to be successful in their journey through higher education. Currently accommodations are limited basic concessions like 1.5 time on tests or a separate proctored room to complete quizzes. However, accommodations like that are not helpful for students with auto-immune issues that keep them in bed for days at a time, or students struggling with anxiety or sensory overload issues. Having extra time on a test isn't going to keep your instructor from giving you a failing grade when your motorized chair breaks down and you miss the test in question. Accommodations in their current iteration are not effective because issues like disability and accessibility are nuanced problems, and thus require nuanced solutions that basic one-size-fits-all approaches cannot begin to address. This is why accommodations tailored to the specific impediments a student is living with are necessary as it relates to access and accessibility in higher education for disabled students. We need to ensure that professors and instructors are receiving periodic competence training surrounding disability, because most individuals don’t have the context necessary to fully grasp why X/Y/Z accommodation is so important to the ultimate success of these students as it relates to passing classes and graduating. As it stands there aren't any tangible avenues for students to bring repercussions down on professors who refuse to honor a student's accommodations. So when professors and instructors don't understand why it is important to take the accessibility of their class work seriously in the first place it increases the probability of further barriers popping up for students in the form of ableist instructors. It solves the issue of lack of accountability for institutions that are not providing holistic support for students with disabilities. The Disability Justice Committee and the action plan they produce will shed light on the scope of the issues and meaningful ways to move forward and implement changes. The eventual goal is to actually implement the outcomes of the plan and improve our higher education institutions for students in years to come.

What would be a successful outcome of your policy proposal?	The HECC's disability justice committee will release the action plan within 1 year of the bill's passage. The Commission will review the plan and move forward with implementation across the state via policy recommendations.
How will you measure successful implementation?	Swift creation of the Disability Justice Committee, hiring staff for the committee, meaningful engagement of impacted groups in the committee, and development of the action plan.
What is the timeline for implementation?	To be implemented within one year after passage of the bill.
Which entities will be responsible for implementing this policy?	Public higher education institutions and The Higher Education Coordinating Commission
What accountability measure(s) should be in place to ensure successful implementation?	Unsure exactly, but we want to ensure there is an official complaint process in place for students to file grievances.
Which existing statutes or programs will this policy affect?	Unsure in the legislature. At institutions it will impact their offices for disability access.

Do you have any additional questions or comments you would like to share with the Task Force?	Please see definitions that may be helpful: Section 504 plan: "Section 504 plan" means a written statement of an educational program for each student with a disability that is developed, reviewed and revised in accordance with criteria established by rules of the Higher Education Coordinating Commission and in compliance with the requirements of section 504 of the Rehabilitation Act, 29 U.S.C. 794. Student with a disability: "Student with a disability" means an individual enrolled in a community college or public university listed in ORS 352.002 who the Higher Education Coordinating Commission has determined, through a process established by the commission by rule, is entitled to a section 504 plan because the student: (a) Qualifies as an individual with a disability under section 504 of the Rehabilitation Act, 29 U.S.C. 794, as amended and in effect on the effective date of this 2017 Act; (b) Has an identified physical or mental impairment, which substantially limits one or more major life activities; (c) Has a record or history of being classified as having a physical or mental impairment of the type described in paragraph (b) of this subsection; or (d) Has been identified by a member of the faculty or staff of the community college or public university as having a learning disability and the student would benefit from a section 504 plan. Please let us know if you have any further questions! Thank you!

Submitter	Luda Isakharov, President at the Associated Students of the University of Oregon
Title of proposal	Higher Education Excused Absence Act
Detailed description	The Higher Education Excused Absence Act recognizes the need for consistent university-wide excused absence policies that accommodate sickness and mental health-related excusals in the state of Oregon, but it also acknowledges that university policies and processes need to be created collaboratively and thoughtfully. Hence, the bill gives every public university in the state of Oregon until the end of the 2023-24 academic year to publish a university-wide excused absence policy that provides students with a baseline of excused absences for sickness (COVID and non-COVID related), mental health issues, and other emergencies. This bill has no fiscal costs attached to it.
What problem will this proposal address?	Currently, Oregon universities do not provide a baseline of university-wide excused absence policies for students. Most policies state that excused/unexcused absences are up to the discretion of every professor and their policies can be found in their syllabus. As a result of unclear standards for excused absences, students are expected to come to class with symptoms of sickness, sometimes including fever, coughing, nausea, and light-headedness. Not only is this unsafe for students and their health, but it also puts faculty at risk. Furthermore, there is no university-wide standard of accommodation for students going through mental health crises without students going through a lengthy and inaccessible process of getting on an accommodation plan through the university. As a result, students going through mental health crises such as severe anxiety, depression, and panic attacks end up having to drop classes and even drop out of university because of their inability to show up every day. Although individual professors can be very accommodating, there are severe discrepancies between excused absence policies in social science versus STEM departments. Where many students studying social sciences often have better luck getting excused or catching up on what they missed, STEM programs expect students to show up to labs and exams even when they express they are “on their death beds”. In the post-pandemic world, it is more important than ever to create clear expectations and accommodations for when students are required to show up in person in order to create safe learning spaces for both students and faculty.

What would be a successful outcome of your policy proposal?	A successful short-term outcome of the Higher Ed Excused Absence Act would be if every public university in Oregon published a university-wide excused absence policy that every professor must implement that defines expectations and accommodations for sickness, mental health, and personal emergency-related absences. Some successful long-term outcomes would be safer learning spaces for Oregon students, higher retention and lower drop-out rates at universities, and lowered barriers for non-traditional students and students with disabilities.
How will you measure successful implementation?	Successful implementation can be measured initially by requiring universities to publish new policies on their websites by the implementation deadline. Additionally, every professor at the universities should be required to include the university-wide policy in their syllabus.
What is the timeline for implementation?	Universities will be informed of this bill at the time of its passing. The HECC will check in with the university administrations before the start of the 2023-24 academic year requesting to see their plans for the creation of the new policy whether it be a task force, a committee through the University Senate, or by other means. In June of 2024, all universities will be required to submit their policies to the HECC as well as publish them on their websites and announce them to faculty.
Which entities will be responsible for implementing this policy?	For consistency, the Oregon HECC will be responsible for reaching out to universities in the fall for their policy development plans, and then again in June 2024 to see if the policies have been posted on university websites.
What accountability measure(s) should be in place to ensure successful implementation?	The Oregon HECC will make sure every university completes its excused absence policies by June of 2024 and that the policies are published on their websites.
Which existing statutes or programs will this policy affect?	This policy will affect no statewide statutes or measures. It may, however, affect existing university-wide policies and understandings.
Do you have any additional questions or comments you would like to share with the Task Force?	The state of Oregon led the nation in 2019 with a similar bill expanding excused absences for K-12 students to cover mental health in 2019. Link 1 Link 2

Submitter	
Title of proposal	
Detailed description	
What problem will this proposal address?	
What would be a successful outcome of your policy proposal?	
How will you measure successful implementation?	
What is the timeline for implementation?	
Which entities will be responsible for implementing this policy?	
What accountability measure(s) should be in place to ensure successful implementation?	
Which existing statutes or programs will this policy affect?	
Do you have any additional questions or comments you would like to share with the Task Force?	

Student Support Survey Findings

(a brief summary of the findings and/or a link to the slide deck posted to the website can be made available if requested by the Chair)

Work Group 3: Systemic Accountability and Continuous Improvement.

Submitted Policy Proposals

Work Group on Systemic Accountability and Continuous Improvement
Policy Proposals Survey Results

Submitter	Jennifer Kovitz, Director of Marketing and Public Relations, Central Oregon Community College
Title of proposal	Permanent Staffing and Funding for Equity Positions
Proposal #	SA-1
Detailed description	Right now, many (most?) staff positions that support underrepresented students at CCs are funded by grants. This is an upside down approach and creates hours and hours of wasted time and energy renewing grants/searching and applying for new ones instead of directing that energy, time, effort to the students themselves. Let's fund permanent support positions at CCs for our Students of Color, LBTQIA+ Students, Student Veterans, First-Gen and Low-Income Students.
What problem will this proposal address?	Right now, many (most?) staff positions that support underrepresented students at CCs are funded by grants. This is an upside down approach and creates hours and hours of wasted time and energy renewing grants/searching and applying for new ones instead of directing that energy, time, effort to the students themselves. Let's fund permanent support positions at CCs for our Students of Color, LBTQIA+ Students, Student Veterans, First-Gen and Low-Income Students.
What would be a successful outcome of your policy proposal?	Permanently funded support positions for underrepresented student communities whose employees and their supervisors can direct more time, energy, effort into serving students rather than finding next year's funding for their roles.
How will you measure successful implementation?	# of perm. funded positions
What is the timeline for implementation?	18 mo
Which entities will be responsible for implementing this policy?	CCs, with funding from the state
What accountability measure(s) should be in place to ensure successful implementation?	Open to ideas

Which existing statutes or programs will this policy affect?	Not sure
Do you have any additional questions or comments you would like to share with the Task Force?	

Submitter	Vicky Lopez Sanchez, Dean of K-12 & Community Partnerships, Portland Community College
Title of proposal	Scaling Student Success Programs Toward Institutional Change
Proposal #	SA-2
Detailed description	Higher education institutions have several programs (TRIO, Future Connect, Educational Opportunities Program, etc.) that are proven to successfully support students access, persistence, and graduation from college. These programs can be scaled-up if provided with sustainable financial resources.
What problem will this proposal address?	- Improve student persistence and success. - Foster a sense of belonging through community building, peer mentors, and coaches. - Help to close the opportunity gap and eliminate educational disparities to ensure all students can thrive. - Move toward institutional change, not just programming.
What would be a successful outcome of your policy proposal?	- Create a structure that allows all students to reach their full potential regardless of traditional barriers to retention and completion. - Create programming and services that promote the diversity and inclusion of all students, support student learning and personal development, foster community, ensure an inclusive environment, and enrich the overall student experience so that they can be successful (student's goals define success - career pathway, certificate, degree seeking).
How will you measure successful implementation?	- Budget estimate - Number of students served - Measure student progress, persistence, retention, goal completion - Staffing plan - Objectives
What is the timeline for implementation?	3-6 months
Which entities will be responsible for implementing this policy?	Community College leadership
What accountability measure(s) should be in place to ensure successful implementation?	- Orientation - Goal setting - Clear expectations and communication - Ensure necessary resources - Record keeping
Which existing statutes or programs will this policy affect?	?

Do you have any additional questions or comments you would like to share with the Task Force?	

Submitter	Theodora Ko Thompson, Admissions Evaluator/Specialist, University of Oregon
Title of proposal	LEARNING JOURNEYS: CRITICAL PARTNERS AND PIPELINES FOR SAFE, INCLUSIVE AND RESILIENT COMMUNITIES
Proposal #	SA-3
Detailed description	Tell me and I'll forget. Show me, and I may not remember. Involve me, and I'll understand. Native American Saying A multiprong approach – concept of multicultural education strategies. Visibility of systemic invisibility. The high cost of systemic invisibility of experiences of underrepresented students and staff. The nation's schools today are more racially and ethnically diverse. We live in a pluralistic society, socialized from early childhood to formulate stereotypes and misconceptions and harbor prejudices about individuals and groups who differ from us and our experiences. We need to recognize that each underrepresented student is an individual who should not be invisible. FAMILY: The campus community is the FAMILY for underrepresented students. Higher Ed institutions are learning organizations. Their communities are rich with learning opportunities: course offerings, museums, language lab resources, with community organizations that offer learning opportunities for the engagement within the university or in the community. These inherently provide opportunities to venture outside the comfort zone, be engaged for the introspection, cultural humility learning of shared values for critical conversations. It is as important to mainstream "courageous conversations" as regular as staff meetings, as annual as retreats, as strategic with benchmarking goals as recruitment/enrollment strategies. Inculcate - make it a natural process - for individual learning journeys to demonstrate valuing diversity. Build on shared values - because every individual needs to be knowledgeable about what's going on that will affect the success of our underrepresented students. RETENTION: of staff of color, the welcoming and supportive environment for underrepresented students and staff – the tokenizing, invisibility of the value of our knowledge and experiences – keeps the status quo of white fragility, the discomfort of talking about critical issues in structural racism. "I don't see color" keeps embedded structural and institutional racism - the modern day racism or laissez-faire racism – at status quo. As it is as crucial to recruit more people of color for the inherent valuable connection to students of color and the vital pipeline for the new generation of leaders, it is as crucial for the "See Us, Hear Us, Value Us" – to value and retain underrepresented staff for the critical

	mentoring, learning for student success. e.g at University of Oregon, we have an interactive dashboard around diversity. A good start. Make transparent these efforts, and accountability for the retention and turnover churn. TARGETED UNIVERSALISM: The campus community is the FAMILY of support for underrepresented students. Child care support is inherently an important issue. Funding students and families, support and resources for student success. Building Multicultural Learning strategies universally across campus. Valuing critical staff and their role in all units for mentoring. Mainstreaming learning journeys through involved engagement that demonstrates the Walk-the Talk, Walk-the-Walk values for universal welcoming, safe and inclusive climates. Strategic plans over the years punt the "hot potato" issues in our collective experiences; strategic plans do not involve all voices for learning and ownership and are absent of transparency and accountable benchmarking goals. Make transparent where the equity gaps are in engagement, training, etc. PIPELINES:. Invest in developing networks with organizations, labor affiliates, for paid internship and immersive opportunities, create or develop pipeline career path journeys that will lead into the growth of an eco-system that reimagines for the future of inclusive and culturally competent Environmental, Social and Governance (ESG) economies.
What problem will this proposal address?	Staff of color and diversity leaders do not have the magic wand to wish away the systemic issues around race and equity that underrepresented students have to contend with. True inclusion – true cultural pluralism - means that every individual – sees responsibility and accountability to the commitment of the institutional mission of being an anti-racist organization that provides a quality education the underrepresented students in our schools need to survive in the new global knowledge-intensive world. Thus to value the mosaic identity of the individual student – emerging leaders of tomorrow. Create the school environment that excites the inquiring young minds to reach for their American Dream. It should not be an elusive dream that any individual student has to forsake. We are all stakeholders with the capacity for introspection, to learn with humility, with strident steps and sincere commitment, to achieve the goals a multicultural education for all to ensure we value welcoming, safe and inclusive resilient communities.
What would be a successful outcome of your policy proposal?	Strategic investment and universal involvement in Dismantling Racism. Anti-Racism work is a journey as arduous as the civil rights and women's suffrage struggles. The high cost of that work is the weight upon the shoulders of people hired into positions to uplift and advocate for underrepresented students. Imperative that everyone recognize they

	have an important role to be Agents of Change. Cultural humility + vulnerability learning journeys: Taking the first step of their learning journey to examine deep-rooted assumptions and prejudices - not the lackadaisical approach or cloak of ""I don't see Color"" that keeps the status quo.
How will you measure successful implementation?	Report cards. Review and evaluate the shortfalls to see where the equity gaps and opportunity gaps are, for universal involved discussions on improvements are, audit mechanisms for transparency and accountability at every departmental level. Empathetic learning growth and goal setting inculcated in regular check-ins - where are we now - and annual performance evaluations.
What is the timeline for implementation?	Perhaps dovetail with HB 2864 initiatives and goals on cultural competency
Which entities will be responsible for implementing this policy?	Executive and senior leadership to be accountable – partnership with all related offices – compliance with HB 2864 initiative and goals on cultural competency
What accountability measure(s) should be in place to ensure successful implementation?	At UO there is an interactive platform on institution diversity numbers. A good start. DEI conducted a community survey. Good revealing info. Which institution has the a good model for transparency and accountability. How did they get there? Retention issue is not new, what is length of service, etc? What do exit surveys reveal? What and where are the pain points, what are the proactive steps that address the issues.
Which existing statutes or programs will this policy affect?	HB 2864. Opportunity grants, etc. (am interested in shared information)
Do you have any additional questions or comments you would like to share with the Task Force?	Thank you. Am honored to be serving on this important Taskforce work.

Submitter	Erin Carpenter, Eastern Oregon Workforce Board
Title of proposal	Requirement of Metrics for Higher Education
Proposal #	SA-4
Detailed description	Require colleges to capture measurable data to help address specific opportunities for improvement to the system and increased access.
What problem will this proposal address?	It will help narrow down the reasons that affect student success so that funds can be placed where they have the best opportunity for the greatest return on investment.
What would be a successful outcome of your policy proposal?	We learn what circumstances are most likely to affect student disengagement and can begin to focus resources to address the gaps.
How will you measure successful implementation?	We will have a list of meaningful measurements to begin capturing and a way to begin compiling the data and reporting the information.
What is the timeline for implementation?	Could begin as soon as the policy is approved, but most likely start capturing data as early as July 1, 2023.
Which entities will be responsible for implementing this policy?	Colleges and high schools would need to begin capturing student data. HECC maybe?
What accountability measure(s) should be in place to ensure successful implementation?	This would have to be created based on the information needed to achieve improvement.
Which existing statutes or programs will this policy affect?	Unsure
Do you have any additional questions or comments you would like to share with the Task Force?	I am wondering if maybe I ended up in the wrong group? I thought we would be addressing recommendations to help students be more likely to succeed.

Submitter	Dana Richardson, Oregon Council of Presidents
Title of proposal	Build upon institutional cultural competency approaches by supporting approaches such as targeted universalism
Proposal #	SA-5
Detailed description	"House Bill 2864, relating to cultural competence at post-secondary institutions of education, was enacted in 2017. Under the bill, public postsecondary institutions are required to establish a process for recommending, and providing oversight for the implementation of, cultural competency standards for the university and its employees. In the case of public universities, HB 2864 appears to have functioned as a strong tool 1) to assess, compile and coordinate existing DEI efforts and programs, 2) to establish assessments and measurements of progress, and 3) as a catalyst to heighten DEI efforts. On several campuses, it appears as though HB 2864 pushed DEI efforts onto the leadership agenda. At all of the institutions there is evidence of increased training and consideration of DEI and HB 2864 in hiring. To build upon the structures established by HB 2864, the state could support institutions setting universal goals that are supported by targeted processes to achieve those goals. One such approach is known as targeted universalism - https://belonging.berkeley.edu/targeted-universalism. Targeted universalism is an approach that doesn't take an overly formalistic, one-size-fits-all policy formula in favor of an approach that is more outcome-oriented. "
What problem will this proposal address?	It would help today's diverse students navigate institutional processes that were built in another time for differently-situated students.
What would be a successful outcome of your policy proposal?	The state and institutions would contribute to changing structural inequities that produce different outcomes for different students.
How will you measure successful implementation?	Assessing whether institutional goals are achieved.
What is the timeline for implementation?	This type of work is underway under HB 2864 and ongoing. State support for this approach could allow institutions to expand current activities in Fall 2023.
Which entities will be responsible for implementing this policy?	Campus communities including students, faculty, staff and administrators.
What accountability measure(s) should be in place to	Reporting on process toward and completion of goals should be expected. Progress toward different goals will require different amounts of time and benchmarks for each should be established at the outset.

ensure successful implementation?	
Which existing statutes or programs will this policy affect?	This should be complimentary to HB 2864 related programs, structures, and discussions.
Do you have any additional questions or comments you would like to share with the Task Force?	

Submitter	Carrie Vath, Dean of Students, SOU
Title of proposal	Higher Education Accountability for Transition-To-Work Success
Proposal #	SA-6
Detailed description	Systemic accountability requires a process to affirm the outcomes produced meet expectations. While public university faculty and staff are focused on – have a deep personal commitment to - getting diverse students into higher education and through to graduation – and metrics tracked by the Higher Education Coordinating Commission affirm how well we are doing at that - the current system does not address how underrepresented students are supported in translating a college degree into career success. This proposal calls for funding to support underrepresented students in internships, career preparation, and transition to work.
What problem will this proposal address?	Underrepresented students will participate in internships, career preparation, and transition to work programs at the same level as other students.
What would be a successful outcome of your policy proposal?	Underrepresented student enter the workforce fully equipped with skills, experiences, and connections to succeed in their careers.
How will you measure successful implementation?	Earning power of underrepresented students one year and five years post-graduation, compared to other students in the same disciplines.
What is the timeline for implementation?	Programs introduced in 2023-25 biennium; outcomes measured in 2025-27 biennium and beyond.
Which entities will be responsible for implementing this policy?	Funding will roll through HECC as block grants to public higher education institutions, who are responsible for using those funds to ensure underrepresented students have full access to internships, career preparation, and transition to work programs by removing barriers.
What accountability measure(s) should be in place to ensure successful implementation?	Need to ensure proper staffing of Career Services departments/offices at institutions before funding is allocated. For example, institutions need to demonstrate how they would be able to implement giving current staffing.
Which existing statutes or programs will this policy affect?	Unknown
Do you have any additional questions or comments you would like to share with the Task Force?	I am excited to join this committee.

Submitter	Lindsay Romasanta, Assistant Vice President, Global Diversity and Inclusion, Portland State University
Title of proposal	Strengthening Equity-Minded Data Capacity of Higher Education Institutions
Proposal #	SA-7
Detailed description	Continuous improvement requires access to data. Nationally, there is a movement to ensure that universities lean into continuous improvement strategies, with philanthropic investments like the Bill and Melinda Gates Foundation providing funding for organizations like NASPA and AASCU to support cohorts of universities to participate in how to utilize the National Student Clearinghouse's Postsecondary Data Partnership. However, universities have to ensure they have the correct software systems, expertise of data analysts, and the correct data tools. This policy proposal is to ensure that state universities have access to funding to build out their data infrastructure through appropriate funding of FTE. In addition, these data analysts should be trained to not just rely on quantitative analysis alone. There is a growing body of research called quant CRT in which critical race theory is implemented alongside quantitative analysis so that data does not perpetuate solely dominant narratives. Instead, it makes it a point to ensure that varied lived experiences are illuminated.
What problem will this proposal address?	This policy proposal will ensure that Oregon higher education systems are not left behind in sharing our data and learning more about our data to create timely interventions to support students. The added expectation of ensuring that data analysts have professional development and training to build their capacities to be equity minded is even more important and will really lead to greater paradigm shifts in transforming higher education to best support underrepresented and minoritized students.
What would be a successful outcome of your policy proposal?	As a result of this policy proposal, all Oregon universities will have greater access to data from an equity-minded lens, leading to greater policy changes that inform the transformative shifts needed.
How will you measure successful implementation?	Timely hire of data analysts and professional development hours.
What is the timeline for implementation?	1-3 academic years.
Which entities will be responsible for implementing this policy?	Legislature ensures funding is diverted to all higher ed institutions and each institution identifies their data infrastucture capacity building needs.
What accountability measure(s) should	To be determined

be in place to ensure successful implementation?	
Which existing statutes or programs will this policy affect?	To be determined
Do you have any additional questions or comments you would like to share with the Task Force?	

Submitter	Aislyn Matias, Staff, Portland State University
Title of proposal	Establishment of a Permanent Committee for Post-secondary Education for Adults in Custody.
Proposal #	SA-8
Detailed description	AIC students in higher ed. have unique barriers to student success, as identified in the recent SB 234 work group findings. Currently, coordinating and managing HEP programs, and the roll out of SB 234 recommendations, are ad hoc and an iterative process. As recommendations from SB 234 take shape, the implementation processes are best managed through jointly-coordinated efforts between the DOC, OCHEP, and the HECC. This proposal seeks to create a permanent coordinated committee tasked with managing HEP programs and issues for AICs. AIC: adult/s in custody DOC: Department of Corrections HEP: higher education prison OCHEP: Oregon Coalition of Higher Ed. in Prison
What problem will this proposal address?	Currently, coordinating and managing post secondary higher ed is an ad hoc and iterative process. The creation of a permanent committee can provide oversight and solutions for issues that directly affect AIC students. Identifying issues, developing solutions for AIC students, and the continuous strategic management of HEP programs resides in the collective and dedicated coordination with AICs (former participants and current), the Department of Corrections, HECC, and Post-secondary partners (incld. HEP providers, OCHEP members).
What would be a successful outcome of your policy proposal?	Increased understanding of the unique issues that affect AIC higher ed students, and increased collaboration and problem-solving that directly address the issues - with net-positive measurable outcomes. Strategic coordination of HEP programs statewide via the permanent committee; the development of shared statewide minimum standards for HEP courses; and the development of a strategic road map for HEP programs.

How will you measure successful implementation?	The success of the permanent committee would be measured by the ability to collectively identify issues and develop implementable solutions that fit the scope of the problems, and wherein the process of successfully navigating the higher education landscape becomes predictable and translatable for AIC students. Success can also be measured by deliverables that include: defining a coordination strategy for HEP programs statewide; the documentation and implementation of shared statewide standards for HEP courses; and increased coordinated support from the DOC, HECC, and other entities that result in a direct increase student access to courses that align with their degree requirements; increased number of eligible AICs enrolled in higher ed programs; increased number of transferable and non-credited higher ed programs offered to AICs; increased number of AICs utilizing Pell and other funding streams.
What is the timeline for implementation?	The creation of a permanent committee and subsequent creation and implementation of shared statewide standards for HEP courses could be developed in approximately one (1) year. The timeline for the committee to create a shared coordination strategy for HEP programs statewide (thus converting it to Statewide HEP Programs) might require two (2) years. The timeline for measuring the implementation of minimum statewide standards for HEP courses may take two (2+) years. The timeline for measuring program enrollment and the disbursement of funding/award trends may take five (5) or more years.
Which entities will be responsible for implementing this policy?	The permanent committee, comprised of HECC, DOC, OCHEP, former and current AICs, and AIC providers, would be collectively responsible for the implementation of shared initiatives.
What accountability measure(s) should be in place to ensure successful implementation?	Accountability for the work group should reside in the recurring application of committee assessment tools. Measurements should be data-driven and reflect target goals.
Which existing statutes or programs will this policy affect?	While HEP management exists in different planes - through DOC, HECC, OCHEP, HEP providers; management does not exist in formal coordination. The creation of a formal work group may directly affect DOC, HECC, OCHEP, and HEP provider programs.
Do you have any additional questions or comments you would like to share with the Task Force?	My apologies for submitting this late - a series of personal disruptions limited my intent to submit earlier. I appreciate this proposal being considered very much!

Submitter	Erika Giesen, Social Science/Human Services Department Chair at Rogue Community College
Title of proposal	Expanding eligibility for the Oregon Promise Grant.
Proposal #	SA-9
Detailed description	Currently, Oregon Promise is a wonderful program that is limited to students who have just earned their GED or graduated from high school. This leads to a disproportionate number of white and middle-class students accessing Oregon Promise because their social capital and class-based resources support their immediate transition from high school to college. This proposal would expand the grant's reach so that aspiring community college students who entered the workforce after high school graduation would also be eligible for assistance to retrain themselves and access community college.
What problem will this proposal address?	Expanding the eligibility of Oregon Promise would solve multiple problems, primarily by expanding the percentage of underrepresented students accessing higher education. It would: - expand the number of first-generation students, who are a larger percentage of non-traditional students (National Center for Education Statistics), to access higher education and greatly lower their student debt - expand the number of BIPOC students, who are a larger percentage of non-traditional students (National Center for Education Statistics), to access higher education and greatly lower their student debt - support the education of single-parents, who are more likely to be women - support the education of LGBTQ+ students, who have greater federal student loans than non-LGBTQ+ students (Williams Institute) - increase the academic success of community college students since nontraditional students tend to have higher GPAs than traditional age college students (Newbold, Mehta and Forbus, 2010)
What would be a successful outcome of your policy proposal?	Increased funding for Oregon Promise to expand the eligibility criteria would increase underrepresented students' access to education and decrease their student debt (which is disproportionately higher). Additionally, nontraditional students have higher GPAs and more academic success. Anecdotally, over 20 years our department has seen that nontraditional students have more drive, focus, and purpose since they are old enough to know what pathway they want to follow; because they have been in the workforce they know what they don't want. Recent high school graduates are much more likely to be in school because of their parents' desires, and to have less focus and thus academic success. Thus, the policy would very likely increase academic success and completion.

How will you measure successful implementation?	Expanded funding for Oregon Promise to a broader eligibility pool is in place. A greater proportion of first-generation, low-income, BIPOC, LGBTQ+, and single-parents are accessing community college education, and their educational debt has significantly lessened. Increased GPAs of Oregon Community College students.
What is the timeline for implementation?	Dependent on funding.
Which entities will be responsible for implementing this policy?	Higher Education Coordinating Commission and Oregon Student Aid.
What accountability measure(s) should be in place to ensure successful implementation?	Oversight of the eligibility criteria expansion to ensure it is inclusive. Data collection on demographic changes to enrollment data in Oregon Community Colleges.
Which existing statutes or programs will this policy affect?	Oregon Promise Grant.
Do you have any additional questions or comments you would like to share with the Task Force?	Thank you for inviting this opportunity for democratic engagement in policy.

Submitter	Kavi Shrestha, Elizabeth Braatz, and Nick Keough, Student Members of JTUSHE Workgroup 3: Systemic Accountability and Continuous Improvement
Title of proposal	Comprehensive Orientation for All Oregon Students
Proposal #	SA-10
Detailed description	Orientation in the public university or community college environment is an important step in supporting students' academic journeys. Underrepresented students, particularly first-generation students, face a unique set of barriers when arriving on college campuses. Oregon's higher education institutions must do better at making support equally accessible to every student and better onboarding students who have little exposure to higher education. Currently, there are flaws within post-secondary orientations across the state and a lack of standardization across institutions. For instance, many institutions do not provide resources for students at orientation about food insecurity, resources, SNAP, housing support and tenant rights, disability accommodations, mental health counseling, student legal services, financial aid literacy, and beyond. While each institution is different, it has been shown that housing insecurity, food insecurity, and other student struggles are present at every higher education institution in Oregon. With systemic insecurities within higher educational institutions, it has statistically been shown that underrepresented students are the most deeply impacted. We can better support students from the beginning by requiring institutions to implement minimum standards for orientation that educate students on various basic needs resources on campus and in the community. Another welcomed addition to this policy would require institutions to provide Spanish translation for orientation events – this is not a current practice.
What problem will this proposal address?	This policy will help fill gaps that currently exist in orientation programs at higher education institutions. Specifically, it will require institutions to provide resources at orientation for: (1) SNAP benefits training and food security resources, (2) housing and tenant support resources, (3) disability accommodations, (4) mental health counseling, (5) student legal services, and (6) financial aid literacy resources. Further, this policy would require Spanish translation at orientation for all higher education institutions. This would provide all students, particularly underrepresented students, with a more comprehensive orientation experience. Therefore, better supporting students' success, health and wellbeing, and retention throughout their time in higher education.
What would be a successful outcome of your policy proposal?	A successful outcome of this policy will bring more awareness to the student populations about resources that may exist for them in supporting their basic needs and personal success. Further, providing Spanish translation will allow Spanish-speaking parents to participate in orientation programs in the same way that English-speaking parents are able to now.

How will you measure successful implementation?	A potential way to measure successful implementation would be for the institutions to report back to the state annually to present benchmarks that show that they have made efforts in these areas or met the requirements of the bill. Further, the resources that are being prioritized in this policy may see a rise in demand from first-year students or students that have attended the more comprehensive orientation session. Some institutions may collect data on who is using these resources that could provide further evidence of how the policy has been a success.
What is the timeline for implementation?	It may take time for institutions to rework their orientation programs to accommodate the requirements of this bill. Further, there may be a cost to some of these requirements. Thus, it may be reasonable to give institutions a year or so to phase the more comprehensive orientations into place.
Which entities will be responsible for implementing this policy?	The public higher education institutions will be responsible for implementing this policy and may need HECC or other state and non-profit agency support.
What accountability measure(s) should be in place to ensure successful implementation?	Public higher education institutions should be required to report back to the state or to HECC that these requirements have been completed and institutionalized within orientation programs.
Which existing statutes or programs will this policy affect?	We are unsure of the answer to this question, but imagine that this policy will not clash with other existing statutes or programs.
Do you have any additional questions or comments you would like to share with the Task Force?	In California, a bill was passed in 2021 mandating all public higher education institutions provide educational information about CalFresh (their state SNAP program) and the student eligibility requirements for CalFresh to all incoming students. See more here.

Submitter	Kavi Shrestha, Elizabeth Braatz, and Nick Keough, Student Members of JTUSHE Workgroup 3: Systemic Accountability and Continuous Improvement
Title of proposal	Ethnic Studies Requirements at Oregon Higher Education Institutions
Proposal #	SA-11
Detailed description	Ethnic Studies is the study of the histories, experiences, cultures, and issues of racial-ethnic groups in the United States. Through the study of power and its linkages to race, ethnicity, class, gender, and sexuality, students gain an understanding of the impacts of systemic inequality and historical movements for social transformation. Further, exposure to ethnic studies for students can help foster a more safe, equitable, and anti-racist campus climate. In 2017, the Oregon State Legislature passed a bill requiring Ethnic Studies to be incorporated into Oregon's K-12 curriculum – becoming the first state in the nation to do so. Currently, in Oregon, there is no requirement for higher education institutions to include Ethnic Studies in their curriculum or require students to take a course in Ethnic Studies. At the University of Oregon, students are required to take a course that meets a "cultural literacy" requirement, but the courses allowed to meet this requirement are broad and not adequate. It's unclear where other institutions are on this front. In passing this policy, students would be required to take an Ethnic Studies course or complete an equivalent course as an undergraduate graduation requirement.
What problem will this proposal address?	Historically, the State of Oregon banned African Americans and forcibly removed Indigenous peoples from their land. The repercussions of these injustices are still felt today. Students should learn about these issues and be exposed to a curriculum that teaches the histories, experiences, cultures, and issues of racial-ethnic groups in the State of Oregon and in the United States. By expanding the curriculum and requiring Ethnic Studies, students will further develop their critical thinking skills and worldview. Additionally, this could promote a campus climate that is safer and more inclusive for students of color – who often report and experience acts of bias and discrimination on Oregon's college campuses.
What would be a successful outcome of your policy proposal?	A successful outcome of this policy would be a more culturally competent and historically aware student body. Further, this policy would help affirm the importance of Ethnic Studies departments in higher education across the state.
How will you measure successful implementation?	Successful implementation of this policy could be measured by tracking each institutions' progress on the course requirements and having them report back to state agencies and the legislature.
What is the timeline for implementation?	The timeline for the implementation of this policy would be similar to Oregon House Bill 2845 – requiring the expectations of the bill to be met after a 4-year period. The legislature and policy makers should work with state agencies and higher education institutions to determine an appropriate timeline.

Which entities will be responsible for implementing this policy?	Oregon's higher education institutions in collaboration with HECC and other state agencies would be responsible for implementing this policy. Institutions should be encouraged to work with existing Ethnic Studies departments (when applicable) to create and plan for this requirement.
What accountability measure(s) should be in place to ensure successful implementation?	Throughout the process and at the end of the implementation period, institutions should be required to report back to HECC and state agencies on their progress in implementing the Ethnic Studies requirement.
Which existing statutes or programs will this policy affect?	This policy would certainly impact the degree requirements of higher education institutions across the state. Ethnic studies classes and departments will certainly be impacted with higher enrollment and demand. Existing statutes around higher education curriculum may be impacted.
Do you have any additional questions or comments you would like to share with the Task Force?	Link to Oregon House Bill 2845 The State of California passed an Ethnic Studies graduation requirement in 2020. Link to bill

Submitter	Kavi Shrestha, Elizabeth Braatz, and Nick Keough, Student Members of JTUSHE Workgroup 3: Systemic Accountability and Continuous Improvement
Title of proposal	HECC Statewide Task Force on Student Fee Autonomy and Shared Governance
Proposal #	SA-12
Detailed description	Student Fee Autonomy and Student Government Autonomy have been bedrock principles of shared governance in higher education in Oregon for decades. Despite this, student fee autonomy and student government autonomy has been threatened and disregarded across various higher education institutions in Oregon over the last few years – see recent examples in next section from Western Oregon University and University of Oregon. This policy would build on 2021's Oregon House Bill 3012 around student fee autonomy statute language by requiring the HECC to form a statewide task force (consisting of student leaders) to look deeper into recent issues that have arisen around student fee autonomy. This bill would investigate the current language of state statutes, current timelines for student fee rejections or alterations by university Boards and administration, and develop recommendations for new practices through the collection of student testimony and perspectives. Following the investigation into the issue, the task force should release a report with recommendations and potential next steps for policy makers to take to protect student fee autonomy.

What problem will this proposal address?	The incidental fee is an integral part to funding student programs, resources, and opportunities. Despite their importance to shared governance, student fee autonomy and student fee process are not as well protected as they should be in the State of Oregon. For instance, at Western Oregon University, the student incidental fee committee was restricted by the University Administration during COVID-19 shutdowns to collecting only 5% of their $1.9 million student incidental fee budget. The incidental fee committee had not been consulted by the University's reopening committee regarding their decision to only charge the incidental fee to student's accounts that were taking classes in-person – violating student fee autonomy. With only gathering 5% of the annual budget, it would have made it extremely difficult for programs, resources, and opportunities to sustain once students, staff, and faculty began returning to campus. Eventually, the ASWOU government submitted an appeal to HECC that was later resolved within 2 days where ASWOU was able to secure a million dollar settlement from the University administration. To provide another example, multiple instances involving student fee autonomy violations have recently occurred at the University of Oregon. For instance, in 2021, management of the student union building's funding was taken away from the ASUO student government's incidental fund by the University Administration. The incident was surrounded with controversy due to the lack of a student involvement in the decision, the violation of the ASUO student government bylaws, and a question of legality. Ultimately, the action resulted in a nearly $10 million reduction in the UO student incidental fee budget, over half of the annual budget, resulting in a major loss of student autonomy over their own student union building. Given these recent issues, this policy proposal would require state agencies and higher education policy experts to look into the recent issue of student fee autonomy violations. For more information on these incidents, helpful links can be found here: (1) https://www.opb.org/article/2021/05/25/oregon-affirms-power-student-governments-have-over-student-fee-money/ (2) https://wou.edu/westernhowl/aswou-makes-a-million-dollar-deal-with-wou-administration/ (3) https://www.dailyemerald.com/news/asuo-senate-vetoes-decision-to-remove-emu-from-i-fee/article_42c6e27e-9125-11ec-a836-fb0d52f59350.html
What would be a successful outcome of your policy proposal?	A successful outcome of this policy proposal would be the acquisition of more information about what policy approaches could be implemented in the future to further protect student fee autonomy in the State of Oregon. Despite the recent narrowing of language that HB 3012 provided, we still need to collect some information on this issue.

How will you measure successful implementation?	If this policy is successfully implemented, a statewide task force around student fee autonomy will be created that incorporates students and higher education policy leaders who develop final policy recommendations for future action in the area of strengthening and protecting student fee autonomy.
What is the timeline for implementation?	The statewide task force could be convened shortly after the bill's passage and could work for a one to two-year period, depending on capacity and need.
Which entities will be responsible for implementing this policy?	The Higher Education Coordinating Commission (HECC) would be primarily responsible for implementing this policy. HECC should also bring students and higher education advocates into the process of implementing this policy.
What accountability measure(s) should be in place to ensure successful implementation?	Given that HECC is a state agency, it will not be too difficult to ensure that this process is completed if this policy is implemented. A timeline will be an important accountability measure to ensure this policy and effort are implemented in a timely manner.
Which existing statutes or programs will this policy affect?	This policy would in the long-run likely impact existing state statutes around student fee autonomy by building on and strengthening current statutes.
Do you have any additional questions or comments you would like to share with the Task Force?	Link to HB 3012

Submitter	Kavi Shrestha, Elizabeth Braatz, and Nick Keough, Student Members of JTUSHE Workgroup 3: Systemic Accountability and Continuous Improvement
Title of proposal	Educational Debt Collection Practices Act
Proposal #	SA-13
Detailed description	This policy proposal would prohibit the practice of transcript withholding and limit the practice of student class registration holds at institutions of higher education as debt collection practices. Holds that result in the following will be prohibited: condition release of unofficial or official transcripts upon debt payment; prevent enrollment in courses and/or changing schedule; less favorable treatment in maintaining status as student at institution. Similar policies have recently been passed in Washington, Louisiana, and California. Washington link Lousiana link California link

What problem will this proposal address?	Administrative holds are problematic and punitive measures that result in compounding penalizing effects including: emotional, financial, and academic distress. These hold policies cause major disruptions in students' education, graduation, and postgraduate entry into graduate programs or the workforce. When a hold is administered, students may be prevented from registering for classes, staying enrolled, working their campus job, attaining campus housing, or accessing their unofficial or official transcript. The practice of higher education placing a "hold" on a students' account is referenced differently at each intuition: administrative holds, financial holds, registration hold, transcript hold, etc. There are dozens of reasons why a hold may be placed on a student's account. Here are some scenarios: Scenario 1: A university graduate cannot access their transcript to apply for a graduate program because of an unpaid balance with the university of $200 for student fees. Scenario 2: A student's financial aid covers all except $100 of their term's cost. They are awaiting their next paycheck to pay the bill. They are prevented from registering for their next term because they have not paid, causing them to lose access to entry in a class they need to graduate. Scenario 3: In spring term, a student is unable to register for the next quarter because of an administrative hold on their account. Over the summer, they are unable to start working at their campus job because they are technically no longer an enrolled student. They are also unable to apply for campus housing because they are no longer enrolled. Because they are unable to pay a small debt with the school, they have lost access to their job and housing. These are just a few examples.This policy disproportionately hurts low income and underrepresented students. Anecdotally, this issue seems to be prevalent among students in Oregon. Due to lack of data on this issue, it is difficult to determine how many students are impacted. An additional layer of difficulty in understanding the scope of this issue is that policies differ across each higher education institution. For instance, PSU and UO have very different policies (links below). We know that this business practice hurts students in a multitude of ways, and ending this practice would help students achieve their educational goals. PSU policy link UO policy link
What would be a successful outcome of your policy proposal?	If barriers were removed around administrative holds, students with stranded credits, unable to continue their education, would return back to school. Further, community colleges and universities would hopefully see an increase in retention of students, especially underrepresented students. Additionally, graduates and former students who did not complete their degree would have access to transcripts to either continue their studies or get a job.

How will you measure successful implementation?	The Higher Education Coordinating Commission (HECC) shall oversee implementation and academic institutions should be required to report back to state agencies their new policies around debt collection practices and removing administrative holds.
What is the timeline for implementation?	To be implemented within a school year of the bill's passage, so the school year of 2024-2025.
Which entities will be responsible for implementing this policy?	Public higher education institutions, community colleges and public universities will be responsible for implementing this policy. HECC will be responsible for oversight.
What accountability measure(s) should be in place to ensure successful implementation?	All institutions should be monitored by the HECC throughout the process. This could look like HECC hearing concerns on implementation at monthly commission meetings. Further, HECC should help institutions facilitate a transition to more compassionate, supportive, and student-centric policies for institutions. The goal should be to ensure that the burden is not shifted to a new form of penalization.
Which existing statutes or programs will this policy affect?	Unsure
Do you have any additional questions or comments you would like to share with the Task Force?	We are happy to share more studies on these issues and student stories. Thank you!

Submitter	Kavi Shrestha, Elizabeth Braatz, and Nick Keough, Student Members of JTUSHE Workgroup 3: Systemic Accountability and Continuous Improvement
Title of proposal	Strengthening Student Legal Services for Oregon Students
Proposal #	SA-14
Detailed description	At a plethora of Oregon's higher education institutions (UO, LCC, PSU, OSU, etc.), students are offered free legal services to assist with matters that may arise around housing and landlord issues, employment and wrongful termination, and beyond. Primarily, this is funded through student incidental fees or mandatory fees paid by students. Unfortunately though, many institutions require that these legal services cannot be used towards the institution. Given that many higher education institutions house and employ students, this leaves students with virtually no legal support when conflicts arise between a student and the institution. Further, students are often not permitted to use legal services when code of conduct issues arise that could threaten their enrollment. Finally, student governments are not permitted to use this legal service support during student fee process when University Boards and Administrations deny or alter student fee decisions. This policy proposal would require student legal service programs to allow students to use these vital resources when issues arise with the institution they attend.
What problem will this proposal address?	Due to unnecessary restrictions, student legal services are often an underutilized resource for students. These policy proposals would eliminate a gap that exists in student legal service programs across the state that prevent students and student governments from using legal services in conflicts or disagreements with their institutions.
What would be a successful outcome of your policy proposal?	The successful outcome of this policy proposal would be the broadening of student legal services. This would allow students more support in areas of university housing, code of conduct situations, and student fee processes.
How will you measure successful implementation?	To measure the success of these policies, student governments and higher education institutions can be asked to report back to state agencies the progress of this requirement.
What is the timeline for implementation?	The timeline for this implementation would likely have to be over a few year period since most student legal services are funded via contracts with legal firms and through student fee processes that take place during the academic year.
Which entities will be responsible for implementing this policy?	Student governments and student fee committees will be responsible for changing language of their contracts and University administrators will be responsible for complying with the policy. Support from HECC may be needed.
What accountability measure(s) should be in place to	Accountability measures that protect the changes to student legal services from University administration retaliation should be strongly considered. Entities responsible for the implementation of this policy

ensure successful implementation?	should report back to state agencies after the initial implementation period.
Which existing statutes or programs will this policy affect?	This policy may impact student fee autonomy statutes. Further, this policy would likely impact current student legal service programs across various institutions.
Do you have any additional questions or comments you would like to share with the Task Force?	n/a

Submitter	Kavi Shrestha, Elizabeth Braatz, and Nick Keough, Student Members of JTUSHE Workgroup 3: Systemic Accountability and Continuous Improvement
Title of proposal	Centralized Statewide Student Resources Portal
Proposal #	SA-15
Detailed description	Numerous programs and resources exist throughout the state to support students in higher education. Despite this, there is little to no centralized promotion of these resources. When students in need try to access resources today, the process of finding resources proves to be difficult – often preventing students from access. This proposal seeks to create and centralize a student resources virtual portal in the form of a website, app, and/or virtual center for easy student access to the numerous existing resources they might not have otherwise known about. The student resources portal aim is to be a "one-stop shop" for student resources on their campus and on a statewide level. For instance, the portal should include a section for statewide resources like SNAP, OHP, rent assistance, and beyond. The regional and campus resources section should include information on resources like local mental health support, food security resources, emergency housing resources, and beyond.
What problem will this proposal address?	This policy proposal will help reduce barriers that prevent students from accessing resources for their basic needs and survival. When students are required to sift through countless lengthy websites or reach out to several different people to receive help, it takes the student's attention away from focusing on their education. A centralized student resources portal would not only help with the underutilization of existing resources for students in higher education, but helps make navigating resources for college students less confusing and more streamlined.
What would be a successful outcome of your policy proposal?	More students in higher education utilizing existing resources that may help with navigating higher education and addressing their basic needs.
How will you measure successful implementation?	Potential ways that successful implementation could be measured is through website traffic metrics, feedback surveys, and through the tracking of student resource demand on each campus.
What is the timeline for implementation?	Given that a website and online portal would need to be designed and launched, the timeline for this would likely have to be a few years. During the website construction process, an advertising and outreach plan should be developed to eventually promote the new student resources portal.
Which entities will be responsible for implementing this policy?	The Higher Education Coordinating Commission (HECC) would be responsible for streamlining these resources into a centralized support portal. The agency should seek to collaborate with Dean of Student offices across institutions and local and statewide non-profits.
What accountability	Given that HECC is a state agency, it will not be too difficult to ensure that this process is completed if this policy is implemented. A timeline

measure(s) should be in place to ensure successful implementation?	will be an important accountability measure to ensure this policy and effort are implemented in a timely manner.
Which existing statutes or programs will this policy affect?	To our knowledge, this will not affect any existing programs or statutes.
Do you have any additional questions or comments you would like to share with the Task Force?	This policy proposal would likely have a fiscal ask attached to it that would designate funding for HECC to complete the website construction.

Submitter	Kavi Shrestha, Elizabeth Braatz, and Nick Keough, Student Members of JTUSHE Workgroup 3: Systemic Accountability and Continuous Improvement
Title of proposal	Cultural Competency for Academic Advisors and Mental Health Counselors
Proposal #	SA-16
Detailed description	Academic advisors and mental health counselors are critical support for students during their journeys in higher education and on campus. On top of the general lack of capacity for these services to meet students' needs, these services tend to not have adequate and culturally competent support systems for students of color, queer students, and other marginalized students. The advising and support needed by students of color, queer students, and other underrepresented student groups are different than what has traditionally been provided. Underrepresented students deserve culturally competent advisors and counselors who understand them. Further, students of color deserve advisors and counselors who come from their own communities. Conversations regarding careers, academics, the future, and mental health all come with “cultural baggage” for Black, Indigenous, and students of color that often require someone with a similar lens to truly understand. Queer students need mental health counseling that is queer affirming and safe. Many counselors are simply not adequately prepared to discuss additional considerations and experiences people from underrepresented identities experience. Thus, there needs to be more efforts put in by academic institutions to recruit and retain advisors and counselors with more racial, cultural, and ethnic diversity. This bill would require higher education institutions to create and uphold a plan for diversifying their advising and counseling workforces for new hires. Additionally, it would mandate and institutionalize cultural competency training and workshops for academic advisors and mental health counselors.
What problem will this proposal address?	Through the diversification of staff and more rigorous cultural competency training, this policy proposal would help foster student support systems (counselors and academic advisors) who are better able to properly address underrepresented students' needs. Thus, reducing the burden of explaining cultures, customs, experiences of racism, and/ or discussing the impact of living as a person of color and its impact on daily life stressors. The lack of LGBTQIA+ representation, and Black, Indigenous, and Persons of Color representation in the advising and counseling departments has deep impacts on students. With diversification, underrepresented students can feel more welcome on campus and have access to mentors and support personnel on campus who understand their lived experiences and background.
What would be a successful outcome of your policy proposal?	A successful outcome of your policy proposal would be higher rates of underrepresented student identities using mental health and academic counseling services on their campuses. Another successful outcome will be a more diverse and culturally competent student support staff who

	are able to take a more holistic and meaningful look at student needs and properly address them.
How will you measure successful implementation?	Each campus should be required to create a plan for student support diversification and cultural competency implementation. This plan should detail plans for the recruitment and retention of BIPOC and queer academic advisors and mental health counselors. Measuring retention of the more diverse staff and underrepresented student foot traffic within advising resources and mental health resources will be an important indicator of successful implementation.
What is the timeline for implementation?	Given the intentionality and planning that would need to go into making this policy successful, the higher education institutions should be given a few years to create plans and act on them. Plans must include a diversification plan and action items for implementing more cultural competency training.
Which entities will be responsible for implementing this policy?	The higher education institutions in Oregon along with support from the Higher Education Coordinating Commission (HECC) will be responsible for implementing this policy and plan.
What accountability measure(s) should be in place to ensure successful implementation?	Universities should be required to track and regularly report back to state agencies on the status and progress of their diversification plans and cultural competency programs for student support systems.
Which existing statutes or programs will this policy affect?	This policy proposal would likely impact existing programs for student academic advising and mental health counseling.
Do you have any additional questions or comments you would like to share with the Task Force?	n/a

Submitter	Larry Roper, Nick Keough
Title of proposal	Campus Accountability Teams
Proposal #	SA-17
Detailed description	1. Every campus will construct a statement of its diversity, equity and inclusion goals, commitments, and expectations for institutional. This statement may be derived from existing statements, including strategic plans, mission, vision and values statements or other documents. Included in this statement should be institutional diversity, equity and inclusion goals to which the institution will be held accountable. 2. Each campus will create and convene a "Campus Accountability" Team. The institution can designate an existing campus body, with the appropriate composition, to serve in the role of Campus Accountability Team. 3. The team will review and provide formal response to the campus' institution-wide goals to improve the cultural inclusion climate for students, faculty, staff and administration from diverse backgrounds. The response will highlight: a. Concerns (areas of improvement) b. Recommendations c. Commendations 4. Campus leaders respond to the accountability team with timelines for addressing concerns and recommendations and assess opportunities to expand work in areas of commendation. 5. The team report and response shall be presented to the appropriate board annually to review progress toward achieving the institution-wide goals. 6. A summary of the accountability process will be sent to the HECC or another designated body for annual submission to the Oregon Legislature. 7. The HECC or another designated body should periodically convene teams from multiple campuses to discuss the development of team responses. The content of process discussions shall consider how to assess the process performance and be used to inform adjustments in the process. In the first year, HECC may invite representatives of community colleges and universities to describe their process. 8. Steps 2-4 will be repeated annually.

What problem will this proposal address?	Establishing this process will ensure that, following the dissolution of the JTUSHE Task Force, there is a venue and fora on each campus to continue to work on issues that students shared with the Task Force and establish ongoing campus discussions with accountability that rests with each respective campus community.
What would be a successful outcome of your policy proposal?	Campus communities exercise accountability for their respective institution.
How will you measure successful implementation?	Campus climate surveys can be used as a measurement tool over time. The key is for venues to exist for campus-specific issues to be addressed.
What is the timeline for implementation?	Ongoing.
Which entities will be responsible for implementing this policy?	Legislature, students, institutional leaders, institutional boards, faculty, staff, accountability team members, members of related institutional committees or work groups.
What accountability measure(s) should be in place to ensure successful implementation?	The proposal describes the measures of accountability.
Which existing statutes or programs will this policy affect?	HB 2864
Do you have any additional questions or comments you would like to share with the Task Force?	