



# University Formula Funding: Student Success and Completion Model (SSCM)

**Postsecondary Finance and Capital**

**September 2019**



# Overview of Funding

\$836.9 Million

- Appropriated for FY2020-21 biennium
- HB 5024, 2019 Regular Session

## Authority/Rules

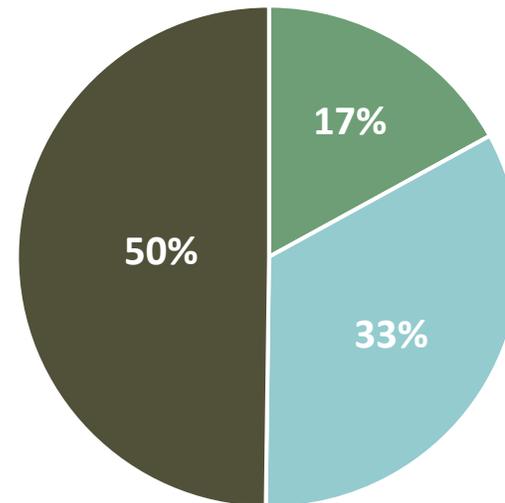
ORS 350.075

OAR 715-013-0025

715-013-0040

\$410.1 Million  
(FY2020)

- \$410.1M – 49% of the total for FY2020
- \$426.8M – 51% of the total for FY2021



- Mission Differentiation, \$69.7M, 17%
- Activities, \$136.2M, 33%
- Outcomes, \$204.2M, 50%



# Mission Differentiation

Taken off the top and grows by the lesser of inflation or the growth in the total funding allocated to the public university support fund (PUSF).

## MISSION SUPPORT



An allocation to support programming consistent with the mission of each institution. Includes public services, cross-institutional programs, operations support, etc.

**21 Programs**  
**\$28.7 Million**

## RESEARCH SUPPORT



An allocation to support research activities conducted by the public universities.

**2 Programs**  
**\$6.6 Million**

## REGIONAL SUPPORT



An allocation that contributes to the financial stability of public universities and ensures geographic access to public higher education for Oregonians.

**9 Programs**  
**\$34.4 Million**



# Funding for Outcomes and Activities – FY2020

**\$410.1 million** Total Allocation

**(69.7 million)** Mission Differentiation

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**\$340.4 million** Available for Outcomes and Activities

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Outcomes

**60%**

\$204.2 million

Activities

**40%**

\$136.2 million



# Outcomes and Activities Data

## OUTCOMES BASED ALLOCATION



- Resident degree completions\* (3-year average)
  - Degrees completed by level and discipline
  - CC Transfer degrees (35% discount)
  - Underrepresented student completions
- Points are awarded and weighted by:
  - Degree level
  - Academic discipline
  - Targeted population group
  - Area of study bonus (STEM, bilingual education)

\*Doctoral completions for both resident and non-residents are included in the formula data

## ACTIVITY BASED ALLOCATION



- Number of resident student credit hours completed by level and discipline (3-year average)
- Summer, fall, winter and spring quarters for the three prior academic years (2017, 2018 and 2019)
- Cost weights applied by level (baccalaureate, master's, doctoral) and academic discipline to get weighted hours



# Data Collection Example – Activities

- The example below includes hypothetical data.
- All resident student completed hours are collected for all levels of instruction across all disciplines.
- Cost weights are applied for each level/discipline combination.

| Course Level                        | Academic Discipline | Avg Credit Hours | Cost Weight | Weighted Hours  |
|-------------------------------------|---------------------|------------------|-------------|-----------------|
| Freshman / Sophomore                | Engineering         | 5,000            | 1.80        | 9,000.0         |
| Junior / Senior                     | Biology             | 2,500            | 1.61        | 4,025.0         |
| Master's                            | Education           | 2,250            | 1.45        | 3,262.5         |
| Doctoral                            | History             | 1,100            | 3.27        | 3,597.0         |
| <b>Total Points for Institution</b> |                     | <b>10,850</b>    |             | <b>19,884.5</b> |



# Funding by Institution – Activities

- All weighted hours for all institutions are added up.
- The total of weighted hours is divided into the available funding to get a dollar value per weighted hour.
- The dollar value per weighted hour is then multiplied by the total weighted hours for each institution to get the funding for each institution.

**\$136.2 million / 3,950,815 weighted hours = \$34.46 per weighted hour**

## Calculation of Funding (\$34.46 per weighted hour)

| Institution   | Weighted Hours   | Dollars              |
|---------------|------------------|----------------------|
| EOU           | 102,004          | \$3,515,409          |
| OIT           | 173,967          | \$5,995,532          |
| OSU           | 1,376,749        | \$47,447,702         |
| PSU           | 1,059,697        | \$36,520,955         |
| SOU           | 160,205          | \$5,521,194          |
| UO            | 850,931          | \$29,326,130         |
| WOU           | 227,262          | \$7,832,265          |
| <b>TOTALS</b> | <b>3,950,815</b> | <b>\$136,159,187</b> |



# Points for the Outcomes Based Allocation

## Degree Weights

|               |     |
|---------------|-----|
| Baccalaureate | 2.0 |
| Master's      | 1.0 |
| Professional  | 1.0 |
| Doctoral      | 1.4 |
| Certificate   | 0.2 |

## Cost Weights

By level of degree and  
academic discipline  
(transfer discount 62.5%)

## Area of Study Bonus

STEM + Health 20%  
Bilingual Education 120%

## Targeted Populations

Low Income (Pell)  
Underrepresented Minority  
Rural  
Veteran



# Data Collection Example – Outcomes

- The example below includes hypothetical data.
- All resident student degrees are collected for all levels of instruction across all disciplines. Degree weights are applied by type of degree.
- Cost weights are applied by level/discipline combination.
- The area of study bonus, transfer discount and the targeted populations bonus are applied as well.

| Type of Degree          | Academic Discipline | Avg Degrees | Degree Weight | Cost Weight | Area of Study Bonus | Transfer Discount | Targeted Population | Points       |
|-------------------------|---------------------|-------------|---------------|-------------|---------------------|-------------------|---------------------|--------------|
| Non-transfer bachelor's | Engineering         | 1.00        | 2.00          | 1.85        | 20.00%              | 0.00%             |                     | 4.44         |
| Transfer bachelor's     | History             | 1.00        | 2.00          | 1.00        | 0.00%               | 37.50%            |                     | 1.25         |
| Master's                | Education           | 1.00        | 1.00          | 1.27        | 0.00%               | 0.00%             |                     | 1.27         |
| Doctoral                | Biology             | 1.00        | 1.40          | 2.86        | 20.00%              | 0.00%             |                     | 4.80         |
| Underrepresented        |                     | 1.00        |               |             |                     |                   | 0.8                 | 0.80         |
|                         |                     |             |               |             |                     |                   | <b>Score:</b>       | <b>12.56</b> |



# Funding by Institution – Outcomes

- All outcomes points for all institutions are added up.
- The total points is divided into the available funding to get a dollar value per point.
- The dollar value per point is then multiplied by the total points for each institution to get the funding for each institution.

**\$204.2 million / 44,667 points =  
\$4,572.47 per point**

## Calculation of Funding (\$4,572.47 per point)

| Institution   | Points        | Dollars              |
|---------------|---------------|----------------------|
| EOU           | 1,212         | \$5,540,545          |
| OIT           | 2,022         | \$9,244,295          |
| OSU           | 15,038        | \$68,761,171         |
| PSU           | 13,063        | \$59,730,976         |
| SOU           | 1,847         | \$8,445,890          |
| UO            | 9,001         | \$41,157,810         |
| WOU           | 2,484         | \$11,358,096         |
| <b>TOTALS</b> | <b>44,667</b> | <b>\$204,238,783</b> |



# Total Funding by Institution – FY2020

| Institution   | Mission Differentiation | Activities Based Funding | Outcomes Based Funding | TOTAL                |
|---------------|-------------------------|--------------------------|------------------------|----------------------|
| EOU           | \$11,946,111            | \$3,515,409              | \$5,540,545            | \$21,002,065         |
| OIT           | \$14,103,219            | \$5,995,532              | \$9,244,295            | \$29,343,046         |
| OSU           | \$18,120,440            | \$47,447,702             | \$68,761,171           | \$134,329,313        |
| PSU           | \$4,317,926             | \$36,520,955             | \$59,730,976           | \$100,569,857        |
| SOU           | \$8,976,721             | \$5,521,194              | \$8,445,890            | \$22,943,805         |
| UO            | \$4,583,479             | \$29,326,130             | \$41,157,810           | \$75,067,419         |
| WOU           | \$7,634,443             | \$7,832,265              | \$11,358,096           | \$26,824,804         |
| <b>TOTALS</b> | <b>\$69,682,339</b>     | <b>\$136,159,187</b>     | <b>\$204,238,783</b>   | <b>\$410,080,306</b> |



# HIGHER EDUCATION

## COORDINATING COMMISSION

The Oregon State Seal is partially visible behind the text. It features a central figure holding a torch and a plow, surrounded by the words "OREGON" and "1859".

Office of Postsecondary Finance  
and Capital

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