INTRODUCTION TO OREGON HIGHER EDUCATION

BEN CANNON, DIRECTOR, HIGHER EDUCATION COORDINATING COMMISSION

February 2, 2017
Presented to: House Committee on Higher Education and Workforce Development
PROGRESS TOWARD STATE GOALS
OREGON’S 40-40-20 GOAL

By 2025, 40% of adult Oregonians will hold a bachelor’s or advanced degree, 40% will have an associate’s degree or a meaningful postsecondary certificate, and all adult Oregonians will hold a high school diploma.

ORS 350.014 (2011)
EDUCATIONAL ATTAINMENT RATES FOR OREGON ADULTS (25-64) VERSUS 40-40-20 GOAL

Educational Attainment Rates for Oregon Adults Versus 40-40-20 Goal

Percent of adults age 25-64

<table>
<thead>
<tr>
<th>Educational Attainment</th>
<th>2015</th>
<th>Goal 2025</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bachelor's or advanced degree</td>
<td>33</td>
<td>40</td>
</tr>
<tr>
<td>Associate's degree or undergraduate certificate</td>
<td>17</td>
<td>40</td>
</tr>
<tr>
<td>Some college, no degree</td>
<td>18</td>
<td>40</td>
</tr>
<tr>
<td>High school diploma or alternative credential</td>
<td>22</td>
<td>20</td>
</tr>
<tr>
<td>Less than HS</td>
<td>10</td>
<td></td>
</tr>
</tbody>
</table>

Data Sources: US Census Bureau, 2015 American Community Survey 1-Year Estimates
Notes: “Associate’s degree or undergraduate certificate” group includes estimate of certificates, derived from national estimates of the number of certificates among adults with “some college, no degree,” and on the number of certificates awarded at Oregon community colleges between 2013 and 2016.
EDUCATIONAL ATTAINMENT RATES FOR OREGON ADULTS VERSUS 40-40-20 GOAL

Educational Attainment Rates for Oregon Adults Versus 40-40-20 Goal

<table>
<thead>
<tr>
<th>Percent of adults age 25-64</th>
<th>American Indian / Alaska Native</th>
<th>Asian American</th>
<th>Black or African American</th>
<th>Hispanic or Latino/-a</th>
<th>Native Hawaiian / Pacific Islander</th>
<th>White, Non-Hispanic</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bachelor's or advanced degree</td>
<td>14</td>
<td>22</td>
<td>30</td>
<td>15</td>
<td>16</td>
<td>34</td>
</tr>
<tr>
<td>Associate's degree or undergraduate certificate</td>
<td>18</td>
<td>16</td>
<td>21</td>
<td>14</td>
<td>18</td>
<td>17</td>
</tr>
<tr>
<td>Some college, no degree</td>
<td>49</td>
<td>21</td>
<td>21</td>
<td>23</td>
<td>15</td>
<td>19</td>
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<tr>
<td>High school diploma or alternative credential</td>
<td>16</td>
<td>5</td>
<td>12</td>
<td>38</td>
<td>40</td>
<td>24</td>
</tr>
<tr>
<td>Less than high school</td>
<td>14</td>
<td>16</td>
<td>21</td>
<td>11</td>
<td>11</td>
<td>7</td>
</tr>
</tbody>
</table>

Data Sources: US Census Bureau, 2015 American Community, Survey 1-Year Estimates

Notes: “Associate’s degree or undergraduate certificate” group includes estimate of certificates, derived from national estimates of the number of certificates among adults with “some college, no degree,” and on the number of certificates awarded at Oregon community colleges between 2013 and 2016.
 Oregon’s 40-40-20 goal, as it exists today in statute, applies to the entire adult population.

- Would imply a massive adult education effort is needed to reach hundreds of thousands of Oregonians with adult education programs, including those who are nearing or beyond retirement age.

In HB 2311 (2017), HECC proposes clarifying the 40-40-20 as a pipeline goal, applying to the expected high school class of 2025 (and beyond).

HB 2311 also proposes that the Commission establish, by rule, new appropriate attainment goals for adult Oregonians, aligned with projected job opportunities.
EDUCATIONAL ATTAINMENT, OREGON HS CLASS OF 2006 (IN 2013)

- 9% Less than high school
- 35% High school or equivalency
- 28% Some college, no completion (estimate)
- 6% Associate's degree or certificate (estimate)
- 22% Bachelor's or advanced degree

Data Source: HECC review of ECONW Analysis, The Education Pathway, Oregon Learns, OregonLearns.org
OREGON EDUCATION PATHWAY

The Education Pathway
Where the Oregon public high school class of 2006* went over the next nine years
*sophomores in 2003–04

<table>
<thead>
<tr>
<th>41,655 sophomores</th>
<th>76% graduate high school</th>
<th>63% enroll in postsecondary education</th>
<th>28% receive post-secondary credentials by age 25</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>28% enroll in 4-yr programs</td>
<td></td>
<td>22% 4-yr degree</td>
</tr>
<tr>
<td></td>
<td>35% enroll in 2-yr programs</td>
<td></td>
<td>5% 2-yr degree</td>
</tr>
<tr>
<td></td>
<td>20% H.S. diploma holders who do not go further</td>
<td></td>
<td>1% certificate</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>48% HS diploma</td>
</tr>
<tr>
<td></td>
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<td></td>
<td>14–17% complete a GED</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>7–10% obtain no credential</td>
</tr>
</tbody>
</table>

24% do not hold an Oregon public high school diploma

4-yr program/degree, high school diploma, 2-yr program/degree, GED

ECONorthwest analysis based on Oregon and U.S. data sources; data visualization, Jason Petz
To learn more: oregonlearns.org
OREGON PIPELINE INCREASINGLY DIVERSE
OREGON PUBLIC HIGH SCHOOL GRADUATES BY RACE/ETHNICITY, 2000-01 TO 2014-15 (ACTUAL), 2015-16 TO 2033-34 (PROJECTED)

Actual | Projections
---|---

High school graduates

<table>
<thead>
<tr>
<th></th>
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<tbody>
<tr>
<td>White, non-Hispanic</td>
<td>-</td>
<td>-</td>
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<tr>
<td>American Indian/Alaska Native</td>
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<td>Asian American/Pacific Islander</td>
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<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Black or African American</td>
<td>-</td>
<td>-</td>
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<tr>
<td>Hispanic or Latino/-a</td>
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</tr>
</tbody>
</table>

Data Sources: Centers for Disease Control data on Oregon birth rates by race-ethnicity, National Center for Education Statistics data on Oregon public elementary and secondary school enrollment and on private high school graduates, Oregon Department of Education (ODE) data on public high school graduates, and historic ODE data on home school graduates.

Notes: Projections derived from HECC analysis and include progression ratios from kindergarten through high school graduation, use the most recent four years of data, and include students entering or exiting the public school system (typically through migration).
In 2014, the HECC adopted the (former) Oregon Education Investment Board Equity Lens as a cornerstone to the state’s approach to policy and budgeting.

“...Equity requires the intentional examination of systemic policies and practices that, even if they have the appearance of fairness, may in effect serve to marginalize some and perpetuate disparities. Data are clear that Oregon demographics are changing to provide rich diversity in race, ethnicity, and language. Working toward equity requires an understanding of historical contexts and the active investment in changing social structures and changing practice over time to ensure that all communities can reach the goal and the vision of 40/40/20.” - Excerpt, Case for Equity
HECC STRATEGIC PLAN 2016-2020: 6 FOCUS AREAS

The HECC’s 2016-20 Strategic Plan charts a path forward to make progress for all Oregon’s current and future students.

- Read the plan at: www.oregon.gov/highered/about/Pages/strategic-plan.aspx

The plan defines six key priorities that will guide higher education funding and policy decisions within the HECC authority.

- **Goal-setting**: sharpening state higher education goals in specific areas, including for working-age adults, and better reporting our progress towards meeting them.
- **Public College and University Funding**: supporting sustainable state funding linked to student success.
- **Pathways**: simplifying and aligning student pathways from cradle to career.
- **Student Support**: enhancing student success, safety, and completion.
- **College Affordability**: limiting student costs for attending college in Oregon.
- **Economic and Community Impact**: contributing to prosperous workforce, economy, and communities.
Established in 2011 and vested with its current authorities in 2013, the HECC is a 14-member volunteer commission appointed by the Oregon Governor, with nine voting members confirmed by the State Senate. The Commission is supported by an Executive Director who oversees the eight offices of the HECC agency.
### Enrollment 2015-16

#### Academic Year Headcount

<table>
<thead>
<tr>
<th>Community Colleges</th>
<th>Headcount</th>
</tr>
</thead>
<tbody>
<tr>
<td>PCC</td>
<td>29,822</td>
</tr>
<tr>
<td>Chem</td>
<td>28,215</td>
</tr>
<tr>
<td>Lane</td>
<td>27,475</td>
</tr>
<tr>
<td>MHCC</td>
<td>26,044</td>
</tr>
<tr>
<td>Clack</td>
<td>19,508</td>
</tr>
<tr>
<td>LBCC</td>
<td>16,292</td>
</tr>
<tr>
<td>COCC</td>
<td>16,236</td>
</tr>
<tr>
<td>RCC</td>
<td>14,542</td>
</tr>
<tr>
<td>UCC</td>
<td>8,311</td>
</tr>
<tr>
<td>SOCC</td>
<td>8,225</td>
</tr>
<tr>
<td>BMCC</td>
<td>6,719</td>
</tr>
<tr>
<td>TVCC</td>
<td>5,929</td>
</tr>
<tr>
<td>Klamath</td>
<td>5,357</td>
</tr>
<tr>
<td>Clatsop</td>
<td>3,046</td>
</tr>
<tr>
<td>CGCC</td>
<td>2,024</td>
</tr>
<tr>
<td>OCCC</td>
<td>1,989</td>
</tr>
<tr>
<td>TBCC</td>
<td>1,1989</td>
</tr>
</tbody>
</table>

#### Total Headcount

- **Community Colleges:** 298,509*
- **Public Universities:** 131,462

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1. Total headcount may contain duplicates for students who attend multiple institutions during the same academic year.
2. Total headcount for OHSU is for Fall of 2016.
3. Total headcount for 21 of the 24 Oregon-based state regulated institutions who have reported data or reported it correctly for the 2015-16 academic year.
4. Total headcount for 107 of the 201 institutions who reported data or reported it correctly for the 2015-16 academic year.
HECC VISION AND ROLE

We will foster and sustain the best, most rewarding pathways to opportunity and success for all Oregonians through an accessible, affordable and coordinated network for educational achievement beyond a high school diploma.

--Vision Statement, HECC Strategic Plan

Key Roles:

- Providing one strategic vision for Oregon higher education planning, funding, and policy
- Authorizing postsecondary programs and degrees
- Administering key Oregon financial aid, workforce, and other programs
- Evaluating and reporting success of higher education efforts
HECC is the single state entity coordinating postsecondary education statewide, and serves as a convener of institutions and groups working across the higher education arena. Responsibilities span:

- State administered financial aid, scholarship, and Outreach (all sectors)
- Funding allocations (public colleges and universities)
- Program/degree approval (public colleges and universities, some privates)
- Mission approval (public universities)
- Student/consumer protection (some privates)
- Data and reporting (all sectors)
- Strategies for coordination (all sectors)

Collaborates to advance P-16 education with Chief Education Office, ODE, higher education institutions, policymakers, and educational partners

Leadership, support, and connections to workforce development
A FEW HECC ACCOMPLISHMENTS SINCE 2015

Research and Policy to Guide State Decisions

• As assigned by the Oregon Legislature, convened postsecondary partners for research, work groups, and policy leadership, and submitted 23 Reports to the Oregon Legislature in 2015-16 on topics of interest to policy leaders.

Affordability

• Successful launch of the Oregon Promise.
• Restructure of Oregon Opportunity Grant (OOG), prioritizing lowest-income students.

Student Success

• Design and implementation of the Student Success and Completion Model for Oregon’s seven public universities, incentivizing investments that lead to degree completion.
• Implementation of federal workforce, career and technical education, GED, and adult basic skills programs with community colleges, workforce partners, and other providers statewide.

Transitions between Sectors and Institutions

• Additional standards for dual credit and other high school based college credit partnership programs.
• FAFSA Plus+ outreach initiative helping more high school seniors complete the FAFSA.
• Supporting students after the sudden closure of several for-profit private postsecondary campuses. For example, after closure of ITT Tech, coordinated with Portland Community College on teach-out opportunity for former ITT Tech nursing students.
2016 COMPLETIONS

46,163° Total Degrees/Certificates Earned at Oregon Public Institutions

47 Degree Granting Private Postsecondary Schools
1,871°

17 Public Community Colleges
21,647

201 Private Career Schools
5,862°

8° Public Universities
24,516

1. Includes Oregon Transfer Module, 1-2 yr. certificates, Associate/Bachelor/Master/PhD degrees, Post-doctoral and professional certificates.
2. Includes OHSU.
3. Total completions from 18 of the 24 Oregon-based regulated schools who reported data or reported it correctly for the 2015-16 academic year.
4. Total completions from 97 of the 201 Oregon-based schools who have reported data or reported it correctly for the 2015-16 academic year.
PUBLIC POSTSECONDARY NATIONAL COMPARISON


# Rising Certificate and Degree Completion at Oregon Public Institutions

<table>
<thead>
<tr>
<th>Academic Year</th>
<th>Number of Bachelor's Degrees Awarded</th>
<th>Number of Associate Degrees Awarded</th>
<th>Number of Undergraduate Certificates Awarded</th>
<th>Number of Advanced Degrees &amp; Graduate Certificates Awarded</th>
</tr>
</thead>
<tbody>
<tr>
<td>2006-07</td>
<td>12,668</td>
<td>6,826</td>
<td>6,332</td>
<td>1,744</td>
</tr>
<tr>
<td>2007-08</td>
<td>12,339</td>
<td>6,332</td>
<td>6,280</td>
<td>1,744</td>
</tr>
<tr>
<td>2008-09</td>
<td>12,339</td>
<td>6,332</td>
<td>6,280</td>
<td>1,744</td>
</tr>
<tr>
<td>2009-10</td>
<td>12,339</td>
<td>6,332</td>
<td>6,280</td>
<td>1,744</td>
</tr>
<tr>
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<td>1,744</td>
</tr>
<tr>
<td>2013-14</td>
<td>16,997</td>
<td>9,406</td>
<td>6,280</td>
<td>1,744</td>
</tr>
<tr>
<td>2014-15</td>
<td>16,997</td>
<td>9,406</td>
<td>6,280</td>
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<tr>
<td>2015-16</td>
<td>16,997</td>
<td>9,406</td>
<td>6,280</td>
<td>1,744</td>
</tr>
</tbody>
</table>

Data Source: HECC analysis of university and community college student-level data
PUBLIC POSTSECONDARY NATIONAL COMPARISON
TOTAL DEGREES AWARDED, EXCLUDING CERTIFICATES:
PERCENT CHANGE SINCE RECESSION (2008-2014)

Maine
California
Illinois
West Virginia
Michigan
New Hampshire
Alabama
Iowa
North Dakota
Vermont
Louisiana
Nebraska
Ohio
Montana
New York
Virginia
South Dakota
Rhode Island
Washington
U.S.

OREGON PUBLIC UNIVERSITY 6-YEAR GRADUATION RATES, FIRST-TIME, FULL-TIME FRESHMAN COHORT

Oregon public university 6-year graduation rate

Data Source: HECC analysis of student-level data
Data Source: IPEDS 3-year graduation rates include first-time, full-time students seeking an associate's degree and are aggregated data reported by Oregon's community colleges to the U.S. Department of Education. (https://nces.ed.gov/ipeds/Home/UseTheData).
OREGON HIGHER EDUCATION: AFFORDABILITY
UNIVERSITY TUITION AND FEES OVER TIME
(ADJUSTED FOR INFLATION – 2015 DOLLARS)

Annual average tuition and fee rates for full-time students in Oregon public, 4-year universities

- **Nonresident tuition and fees, adjusted for inflation (2015 dollars)**: $18,334 (2005-06) to $24,927 (2015-16)
- **Resident tuition and fees, adjusted for inflation (2015 dollars)**: $6,334 (2005-06) to $8,764 (2015-16)

Data Source: HECC
COMMUNITY COLLEGE TUITION AND FEES OVER TIME
(ADJUSTED FOR INFLATION – 2015 DOLLARS)

Annual average in-district tuition and fee rates for full-time students in Oregon community colleges

Data Source: HECC
**OREGON’S STATE-ADMINISTERED FINANCIAL AID PROGRAMS**

<table>
<thead>
<tr>
<th>Program</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Oregon Opportunity Grant (OOG):</strong></td>
<td>Oregon’s largest state-funded, need-based grant program Oregon’s longstanding need-based financial aid program serving the lowest-income Oregonians with grants of $2,250 toward postsecondary expenses. The OOG supports low income students and families, including young students and adults, attending eligible public and private Oregon colleges and universities.</td>
</tr>
<tr>
<td><strong>Oregon Promise:</strong></td>
<td>Oregon’s newest state grant program, providing grants to support most or all tuition at Oregon community colleges for recent high school graduates and GED recipients, supporting college access for families of all income levels.</td>
</tr>
<tr>
<td><strong>OSAC Scholarships:</strong></td>
<td>HECC- Office of Student Access and Completion administers over 500 privately funded scholarships for Oregon students and hosts a central application portal for students statewide.</td>
</tr>
<tr>
<td><strong>Other State-administered financial aid programs:</strong></td>
<td>Chafee Grant for current or former foster care youth, Childcare Grant, and more.</td>
</tr>
</tbody>
</table>
OREGON OPPORTUNITY GRANT: FUNDING GAP

OOG Eligible Applicants vs. Recipients
2007-08 to 2016-17* YTD

Data Source: HECC
*Year to date estimates
THE OREGON PROMISE IS A LAST-DOLLAR PROGRAM THAT BUILDS ON FEDERAL AND OTHER STATE GRANTS

Data Source: HECC
AFFORDABILITY: NUMEROUS FACTORS

Student or family resources

Full college costs, (including tuition, room and board, textbook, supplies, transportation etc.)

Financial Aid (state, federal, institutional, private)

Earnings after graduation

Type of degree/certificate/major

Time to completion

Completion
OREGON
HIGHER
EDUCATION:
INTRODUCTION
TO FUNDING
HISTORY
POSTSECONDARY EDUCATION AS COMPONENT OF STATE BUDGET

2015-17 Percent of Total State General Fund/ Lottery Fund State Expenditures (19.5 Billion Total)

- K-12 Education: 49.7%
- Postsecondary Education: 37.0%
- Other Education: 9.5%
- Other State: 3.9%

NOTE: The “Other Education” category includes Early Learning programs; Youth Development programs; and all other K-12 payments to districts other than the State School Fund.

Data Source: Governor’s Recommended Budget.
<table>
<thead>
<tr>
<th>Year</th>
<th>Universities</th>
<th>Community Colleges</th>
</tr>
</thead>
<tbody>
<tr>
<td>1999-01</td>
<td>$9,315</td>
<td>$3,166</td>
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<tr>
<td>2001-03</td>
<td>$7,853</td>
<td>$2,675</td>
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<tr>
<td>2003-05</td>
<td>$6,396</td>
<td>$3,064</td>
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<tr>
<td>2005-07</td>
<td>$6,727</td>
<td>$3,046</td>
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<td>2007-09</td>
<td>$7,172</td>
<td>$3,039</td>
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<tr>
<td>2009-11</td>
<td>$6,473</td>
<td>$1,942</td>
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<td>2011-13</td>
<td>$5,013</td>
<td>$2,127</td>
</tr>
<tr>
<td>2013-15</td>
<td>$5,779</td>
<td>$2,467</td>
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<td>2015-17</td>
<td>$7,084</td>
<td>$3,174</td>
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<tr>
<td>2017-19</td>
<td>$7,446</td>
<td>$3,216</td>
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</tbody>
</table>

**Notes:**
- Includes Debt Service
- University data includes PUSF and State Programs
- Community College data includes only CCSF distributed by funding formula
- Enrollment for 2017, 2018, 2019 assumed at 2016 levels
- Inflation adjustment based on Portland CPI-U

Data Source: HECC
OREGON PUBLIC FTE ENROLLMENT AND EDUCATIONAL APPROPRIATIONS PER FTE, FY 1990-2015

**NOTES:**
- Data adjusted for inflation using the Higher Education Cost Adjustment (HECA).
- Full-time equivalent (FTE) enrollment equates student credit hours to full-time, academic year students, but excludes medical students.
- Educational appropriations are a measure of state and local support available for public higher education operating expenses including ARRA funds, and exclude appropriations for independent institutions, financial aid for students attending independent institutions, research, hospitals, and medical education.
- Net tuition revenue is calculated by taking the gross amount of tuition and fees, less state and institutional financial aid, tuition waivers or discounts.

PUBLIC POSTSECONDARY NATIONAL COMPARISON
STUDENT SHARE: NET TUITION AS A PERCENT OFF TOTAL EDUCATIONAL REVENUE, FY 2015

According to the 2015 State Higher Education Finance (SHEF) Report, Oregon public funding per student was still ranked among lowest nationwide:

- Oregon ranked 45th in the actual public educational appropriation per student in 2015 ($4,788 per student compared with $6,966 nationally).
- Since the 2008 recession, Oregon saw the 20th highest rate of decrease in public funding per student, showing that investments did not keep pace with enrollment over this time.
- **This SHEF report addresses funding for 2015 and earlier. It does not take into account the significant new higher education investment the Oregon Legislature made in the 2015-17 biennium.**

2017 preliminary numbers show significant increases, but Oregon is still accounting for years of under-investment.