HIGHER EDUCATION COORDINATING COMMISSION

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

HIGHER EDUCATION COORDINATING COMMISSION

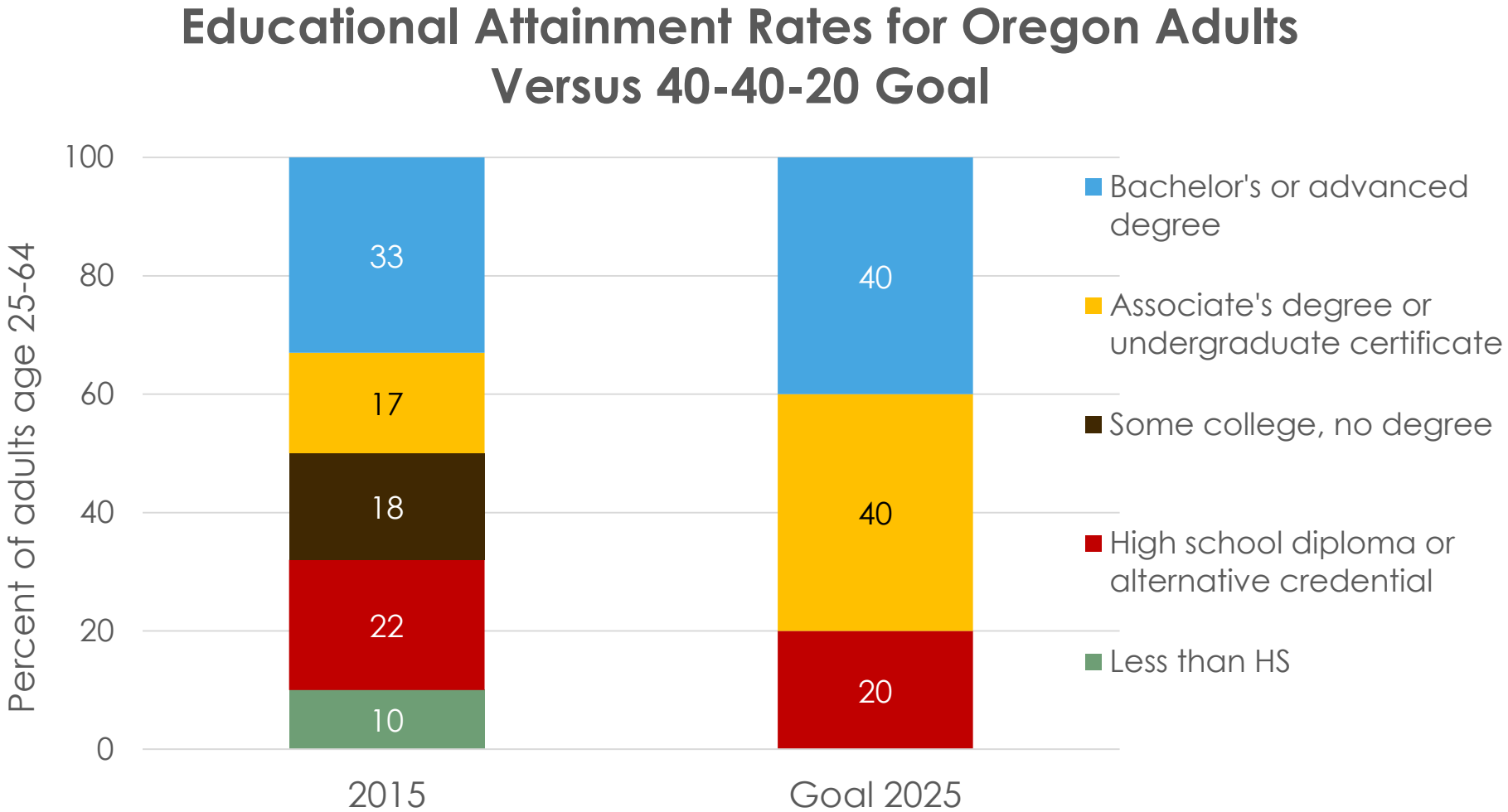
PROGRESS TOWARD STATE GOALS

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



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.

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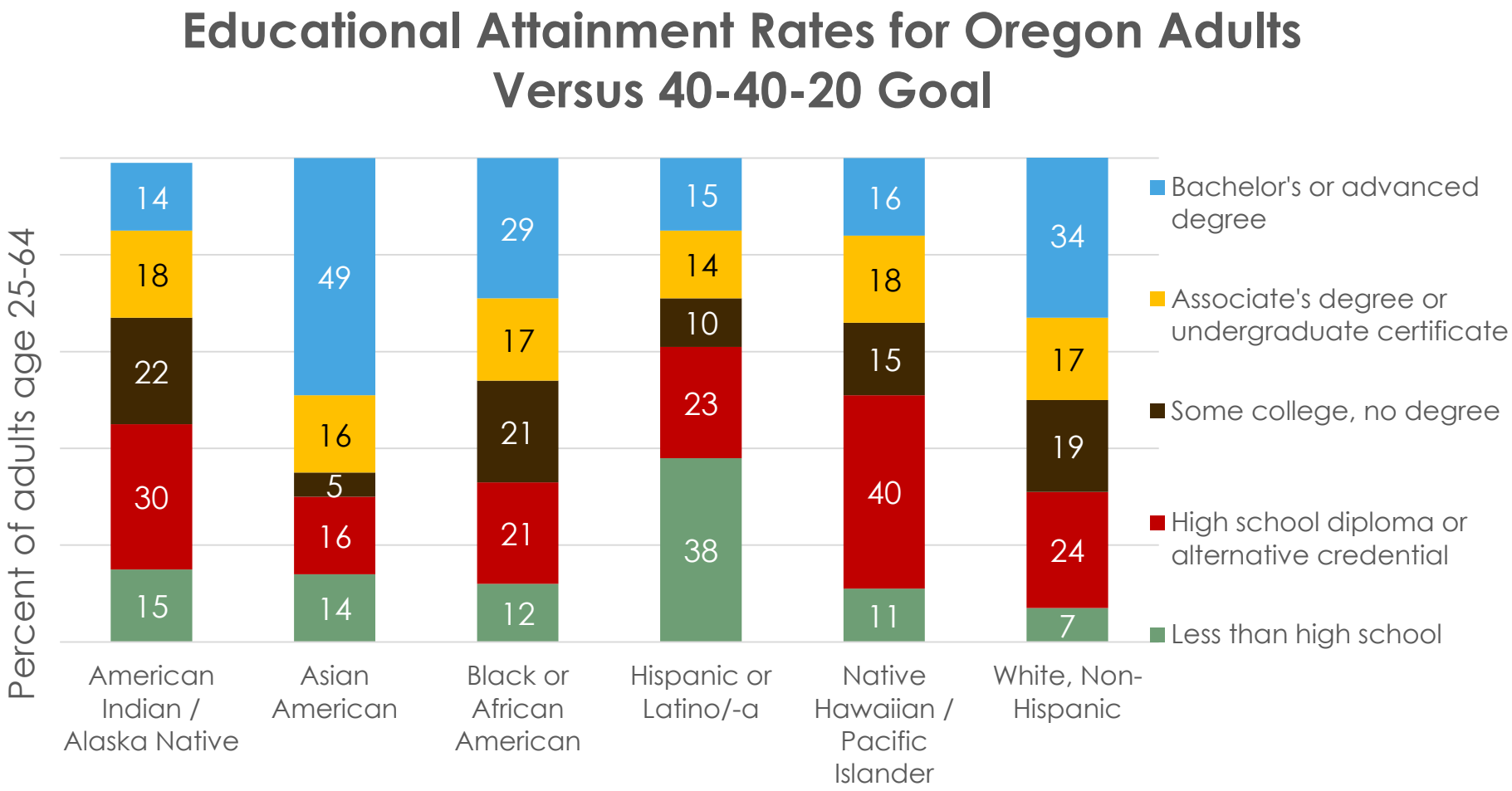
EDUCATIONAL ATTAINMENT RATES FOR OREGON ADULTS VERSUS 40-40-20 GOAL



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40-40-20: CLARIFYING THE GOAL

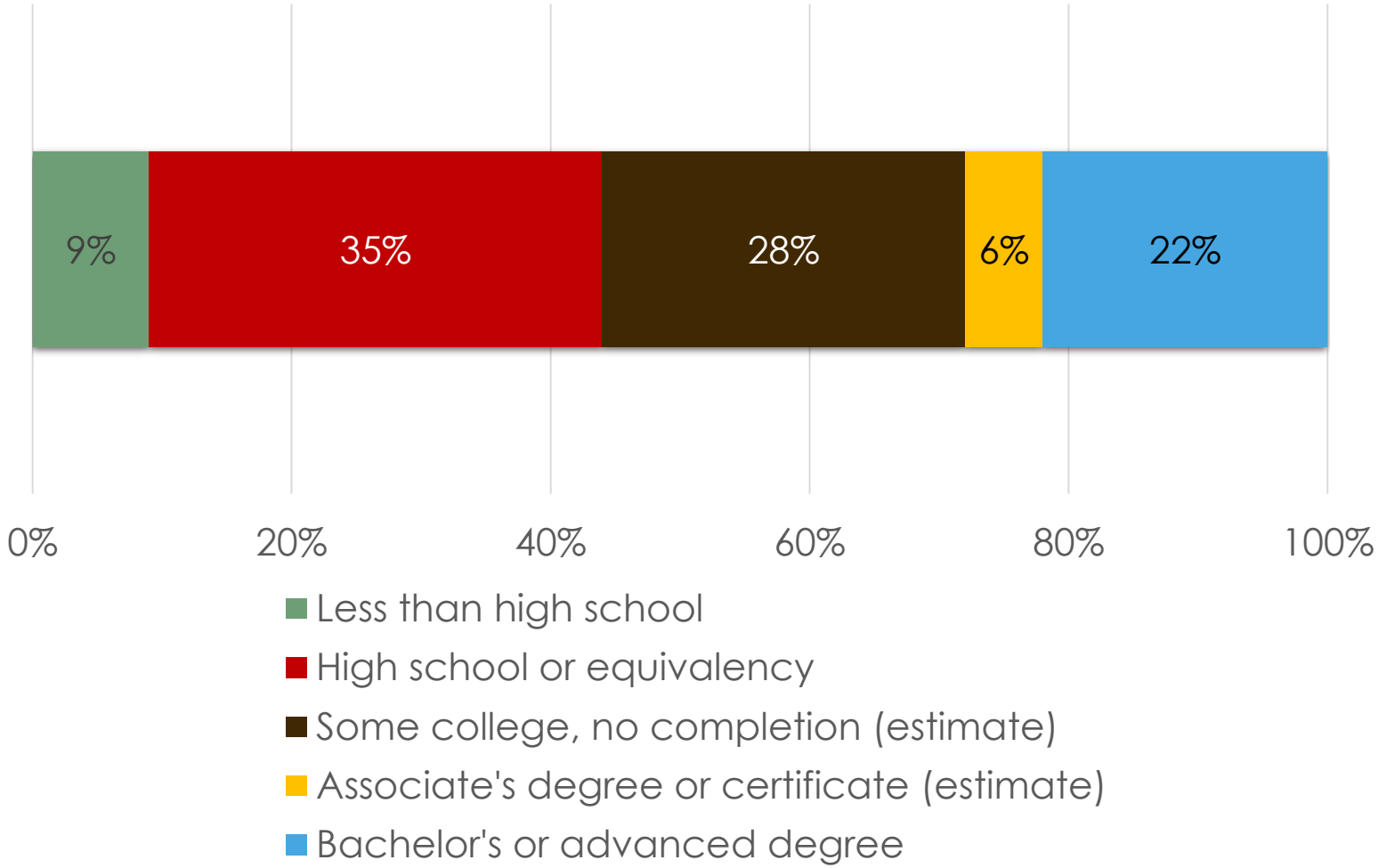
Oregon's 40-40-20 goal, as it exists today in statute, applies to the entire adult population.

- 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).

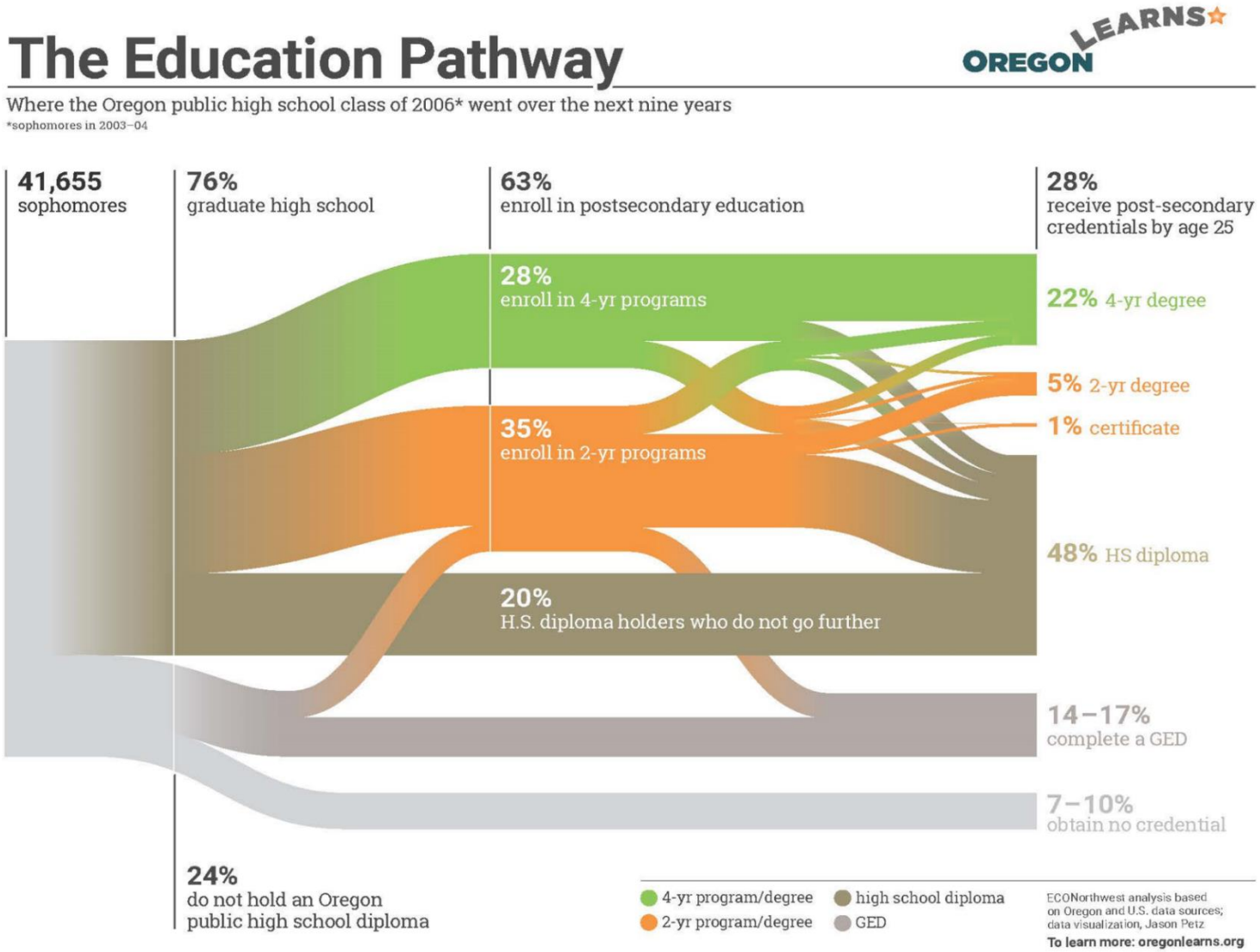
HB 2311 also proposes that the Commission establish, by rule, new appropriate attainment goals for adult Oregonians, aligned with projected job opportunities.

EDUCATIONAL ATTAINMENT, OREGON HS CLASS OF 2006 (IN 2013)



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

OREGON EDUCATION PATHWAY



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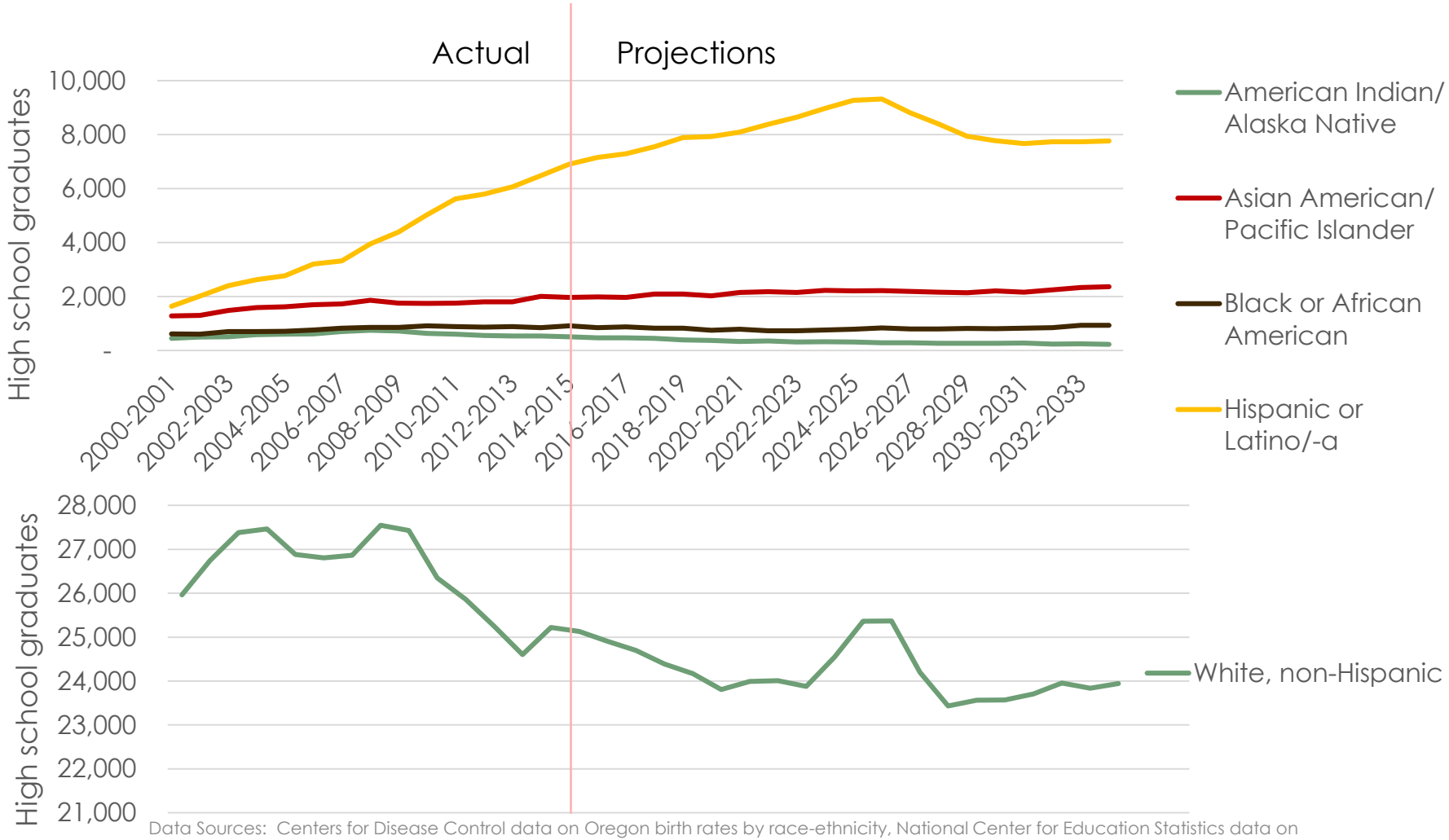
OREGON PIPELINE INCREASINGLY DIVERSE

OREGON PUBLIC HIGH SCHOOL GRADUATES BY RACE/ETHNICITY, 2000-01 TO 2014-15 (ACTUAL), 2015-16 TO 2033-34 (PROJECTED)



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).

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EQUITY LENS

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.

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OREGON HIGHER EDUCATION: STATE STRUCTURE

SWOCC

STATE HIGHER EDUCATION STRUCTURE

Public Board/Commission

State Agency

State Education Partners

Oregon Governor

Oregon Legislature

- Chief Education Office
- State Board of Education
- Oregon Department of Education
- Employment Department
- Oregon Workforce Investment Board
- Oregon Youth Conservation Corps Advisory Board

Higher Education Policy and Funding Coordination

- Responsibility across all sectors of higher education, public and private
- A clearly-defined focus on coordination, not governance

HECC Commission*

HECC Agency*

- Research &Data; Executive Director, Policy, and Communications; Operations,
- Office of Student Access and Completion (OSAC)
- Community Colleges and Workforce Development (CCWD)
- Public University Coordination
- Private Postsecondary Education
- Workforce Investments

Public Institution Governance

17 Community College Locally Elected Governing Boards

- BMCC
- COCC
- Chemeketa CC
- Clackamas CC
- Clatsop CC
- CGCC
- KCC
- LCC
- LBCC
- MHCC
- OCCC
- PCC
- RCC
- SWOCC
- TBCC
- TVCC
- UCC

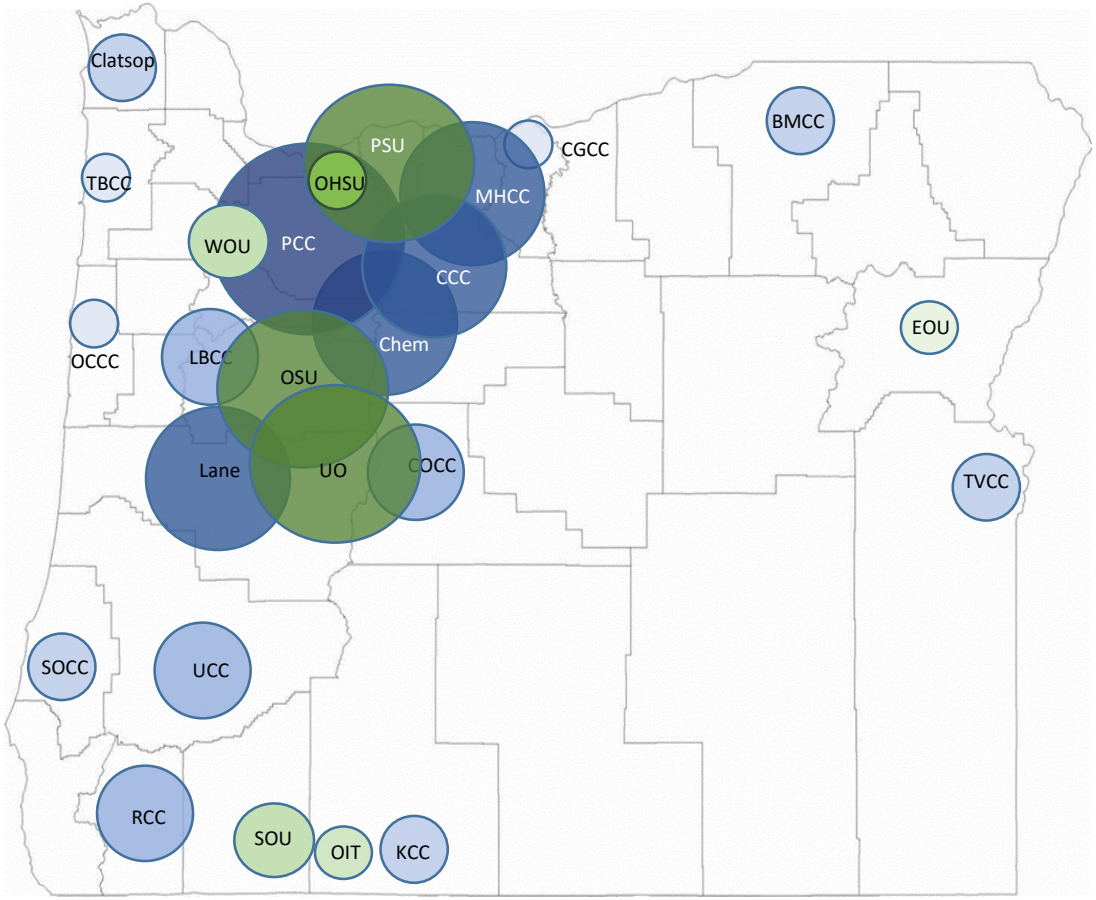
7 Oregon Public University Institutional Governing Boards (Governor-appointed, Senate-confirmed)

- EOU
- OIT
- OSU
- PSU
- SOU
- UO
- WOU

Shared Services Enterprise

HIGHER EDUCATION COORDINATING COMMISSION

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.



Oregon Health Sciences University	2,899[2]
Private Degree-Granting Postsecondary Institutions	6,364[3]
Private Career Schools	13,528[4]

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.

ENROLLMENT 2015-16

academic year headcount[1]

Community Colleges	
78,775	PCC
29,822	Chem
28,215	Lane
27,475	MHCC
26,044	Clack
19,508	LBCC
16,292	COCC
16,236	RCC
14,542	UCC
8,311	SOCC
8,225	BMCC
6,719	TVCC
5,929	Klamath
5,357	Clatsop
3,046	CGCC
2,024	OCCC
1,989	TBCC
298,509*	

Public Universities	
38,798	PSU
37,468	OSU
27,477	UO
8,183	SOU
7,114	WOU
6,556	OIT
5,866	EOU
131,462	

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: COORDINATION AND CONNECTIONS

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**.

Oregon Coast CC

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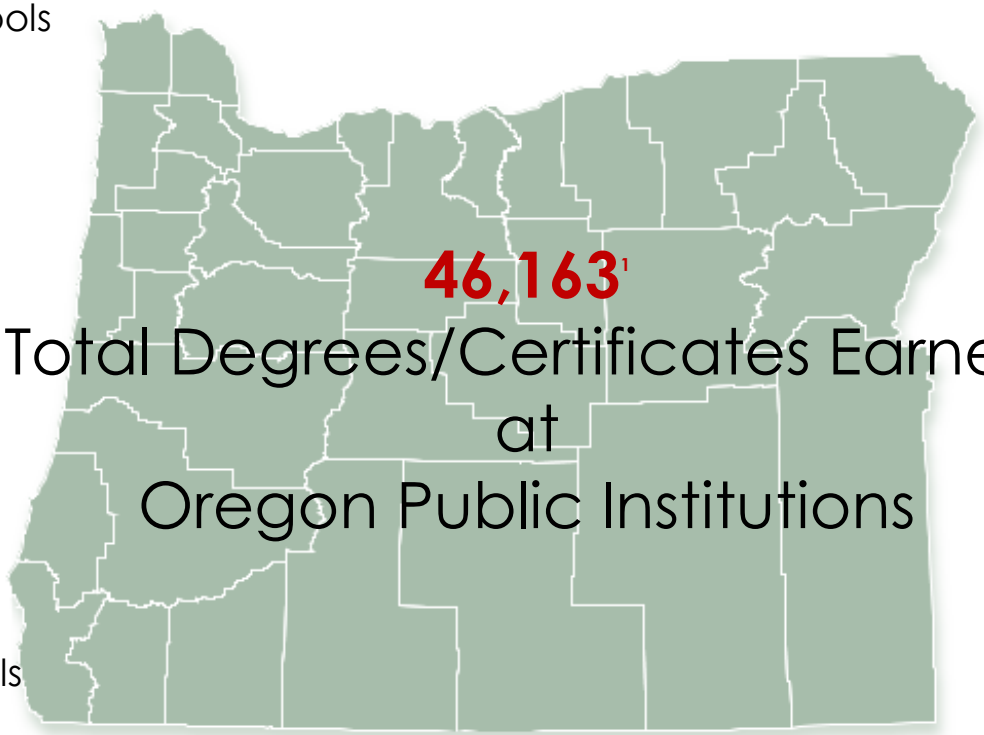
OREGON HIGHER EDUCATION: STUDENT SUCCESS

2016 COMPLETIONS

47
Degree Granting Private Postsecondary Schools
1,871[3]

17
Public Community Colleges
21,647



46,163[1]

Total Degrees/Certificates Earned at Oregon Public Institutions

201
Private Career Schools
5,862[4]

8[2]
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.

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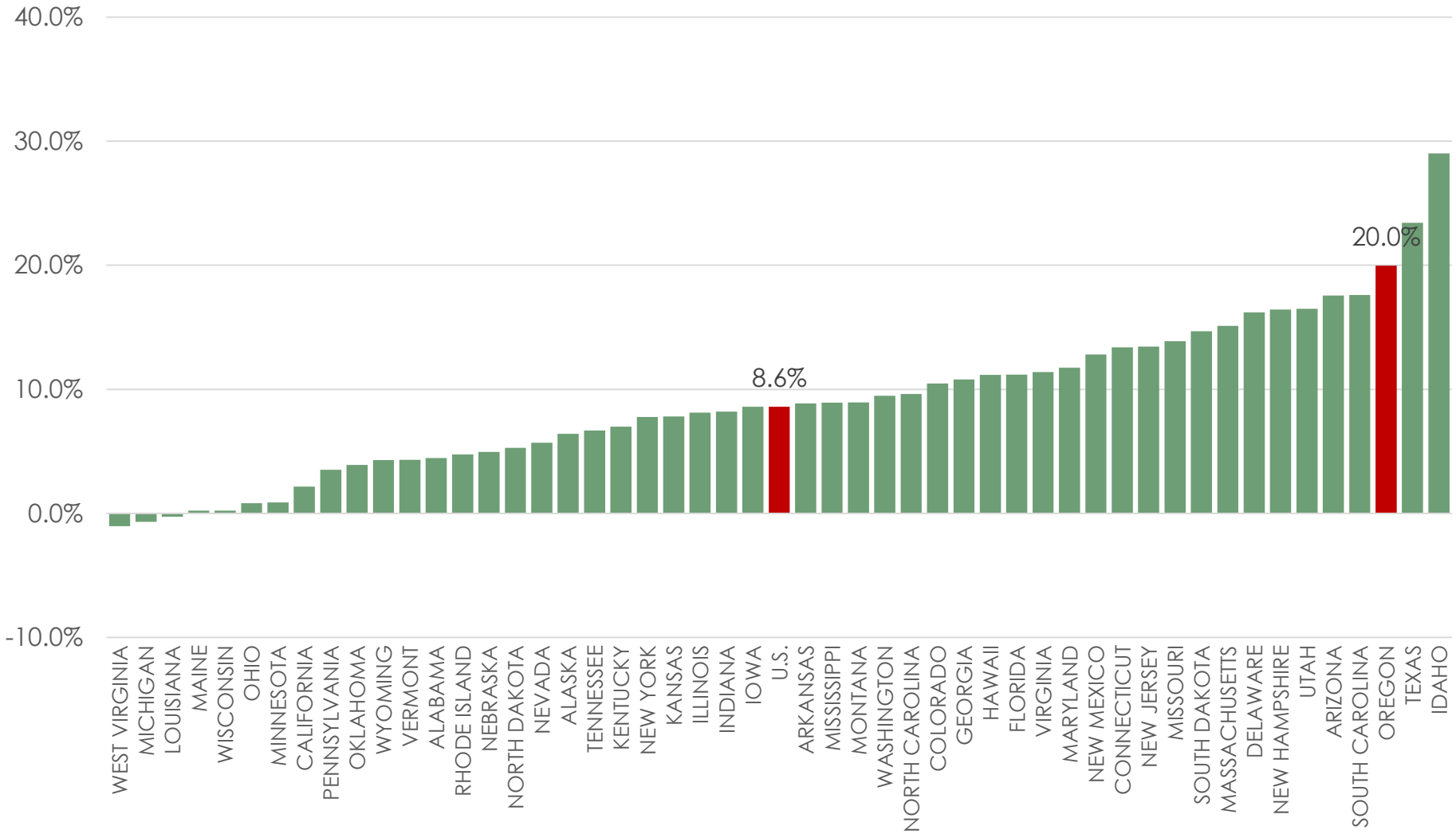
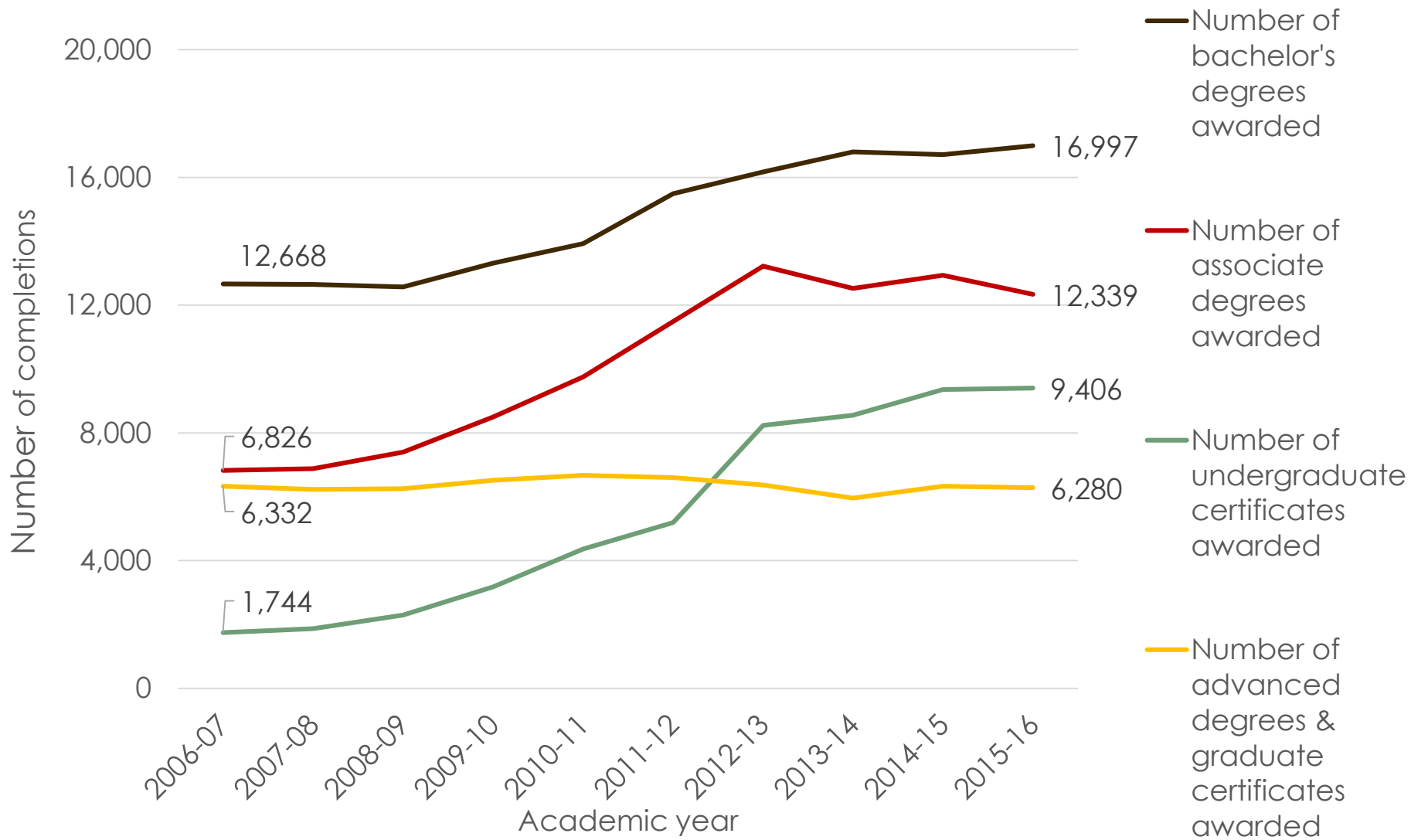
FTE ENROLLMENT: PERCENT CHANGE SINCE RECESSION (2008-2015)



Data Source: 2015 State Higher Education Finance Report, SHEEO, http://www.sheeo.org

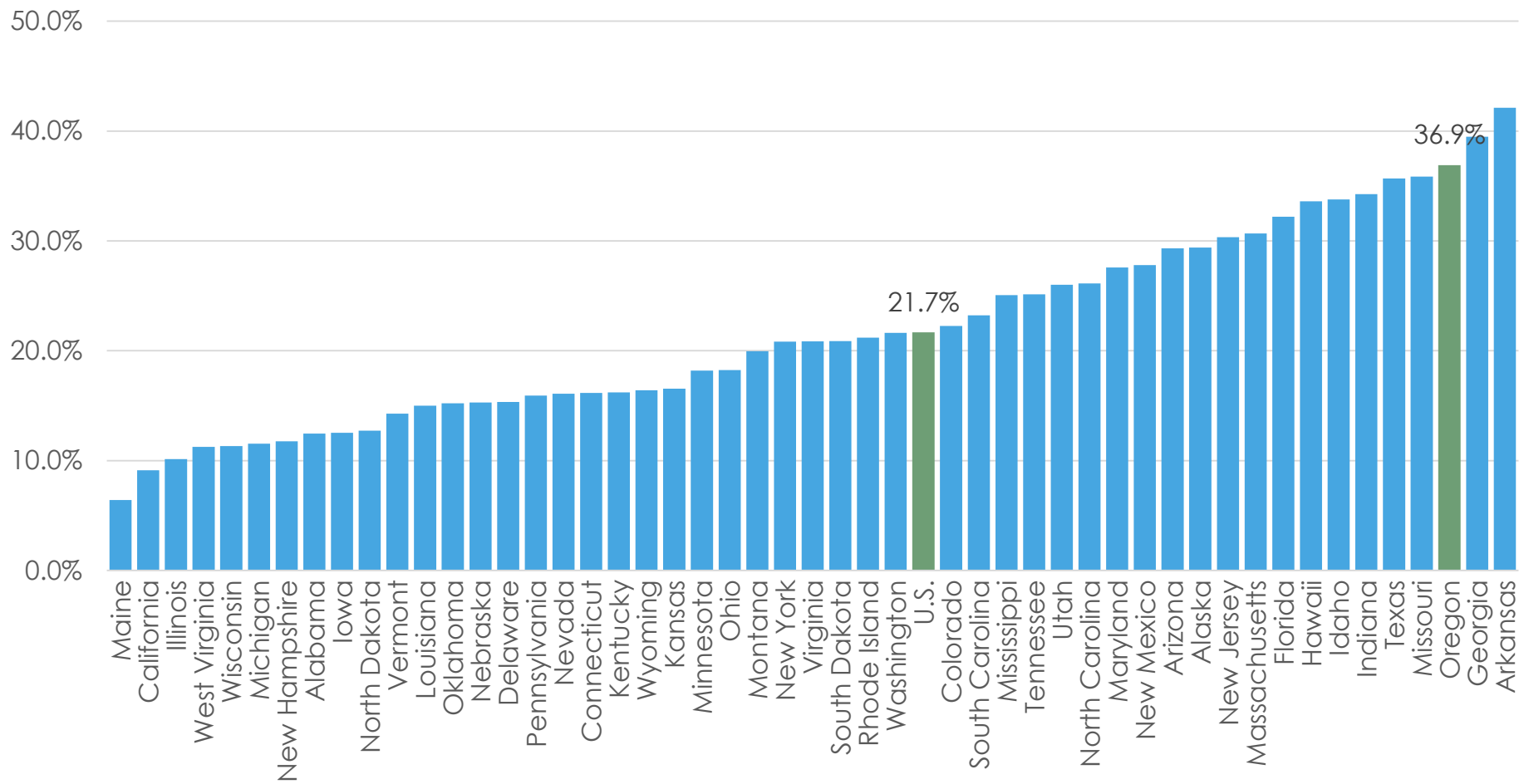
RISING CERTIFICATE AND DEGREE COMPLETION AT OREGON PUBLIC INSTITUTIONS



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)



Source: 2015 State Higher Education Finance Report, SHEEO, http://www.sheeo.org

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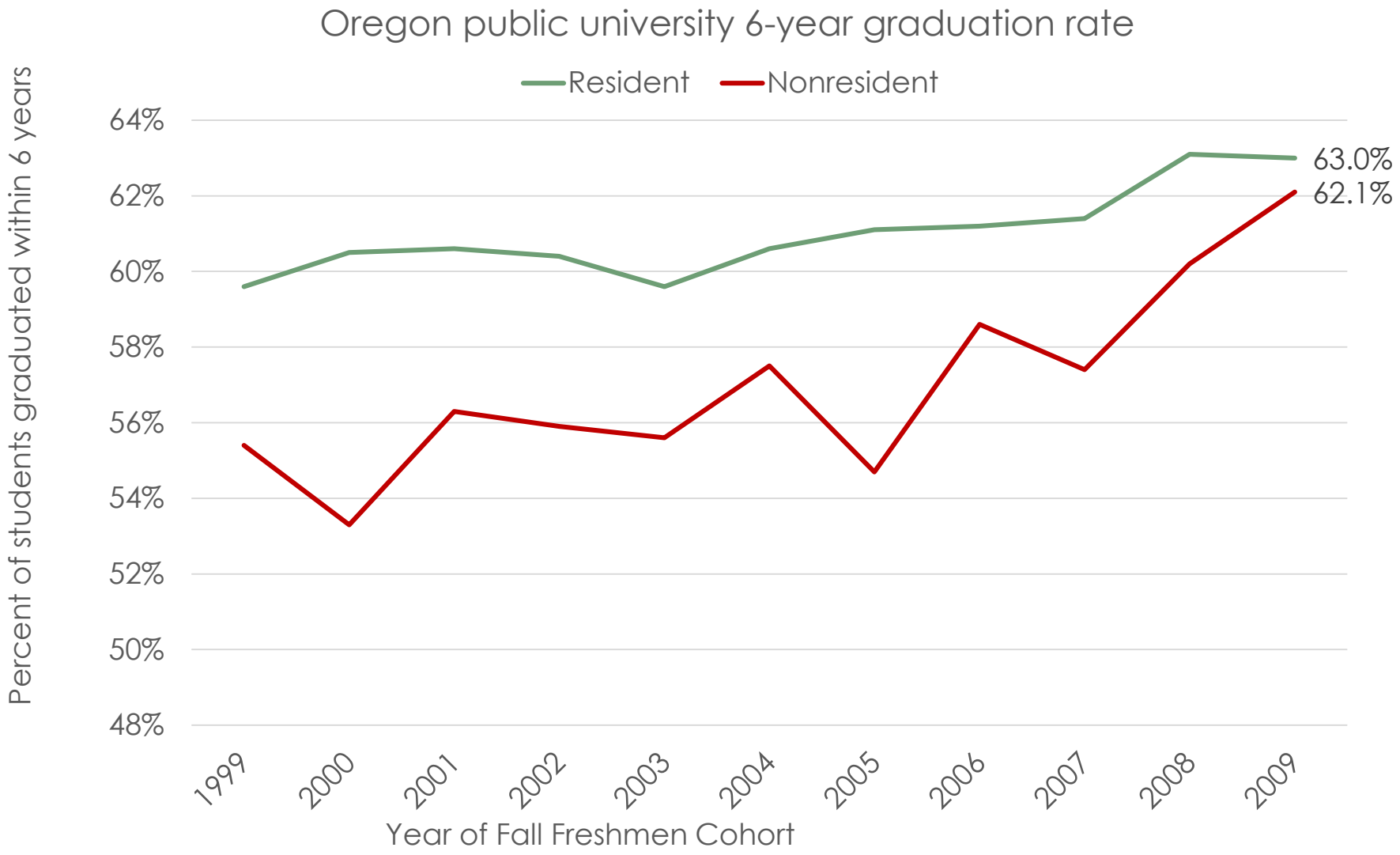
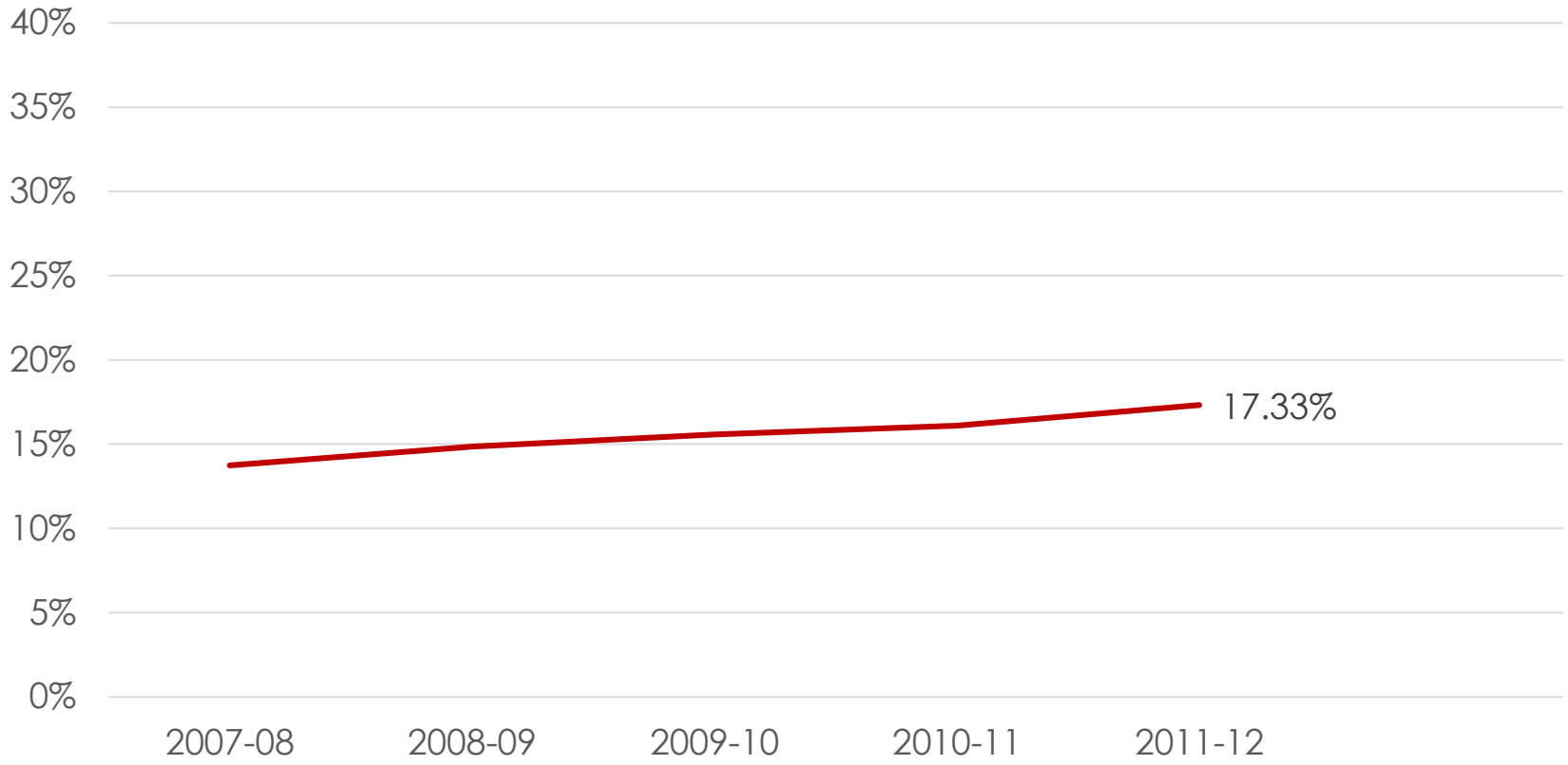
OREGON PUBLIC UNIVERSITY 6-YEAR GRADUATION RATES, FIRST-TIME, FULL-TIME FRESHMAN COHORT



Data Source: HECC analysis of student-level data

OREGON PUBLIC COMMUNITY COLLEGE 3-YEAR COMPLETION RATES, FULL-TIME FRESHMAN COHORT



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).

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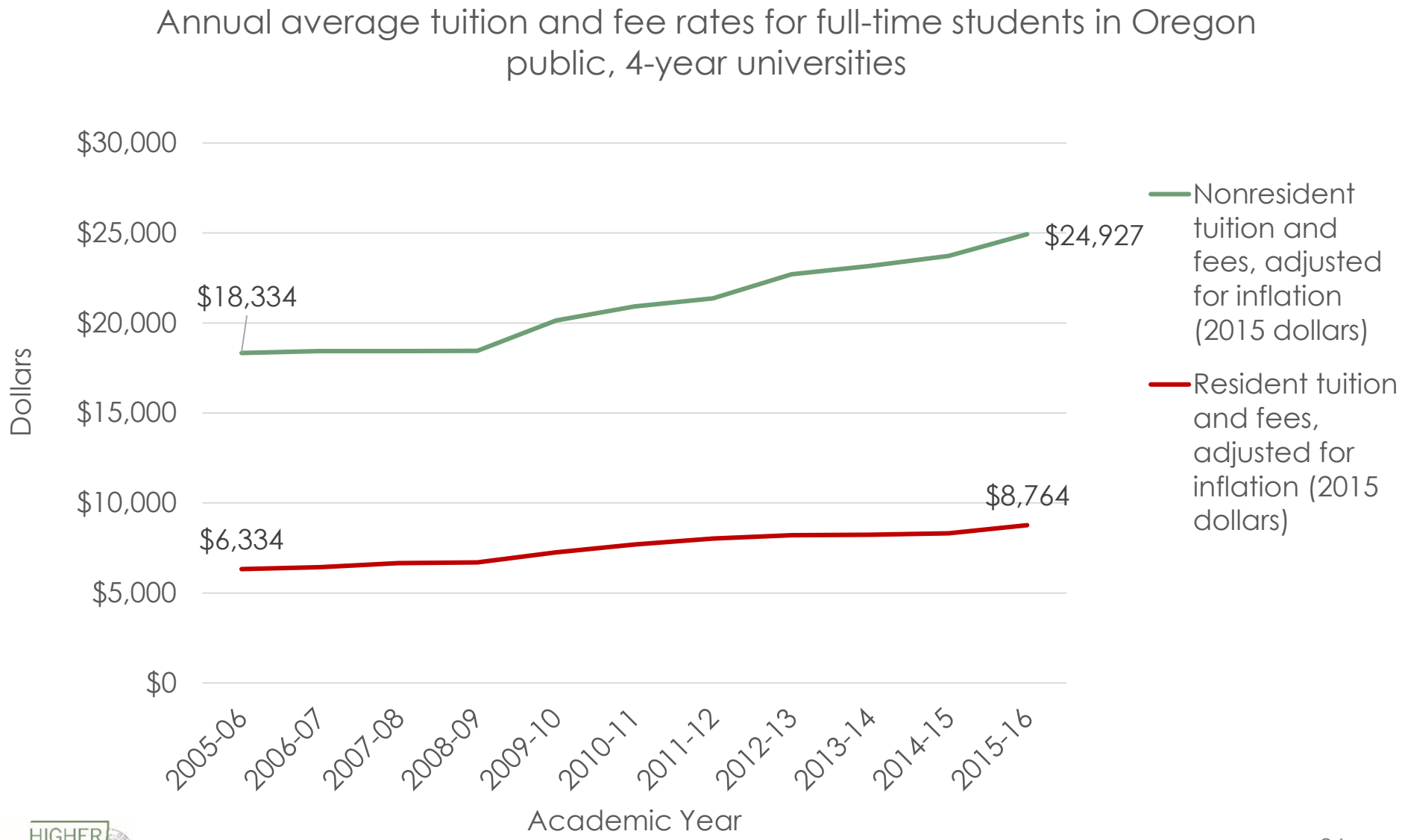
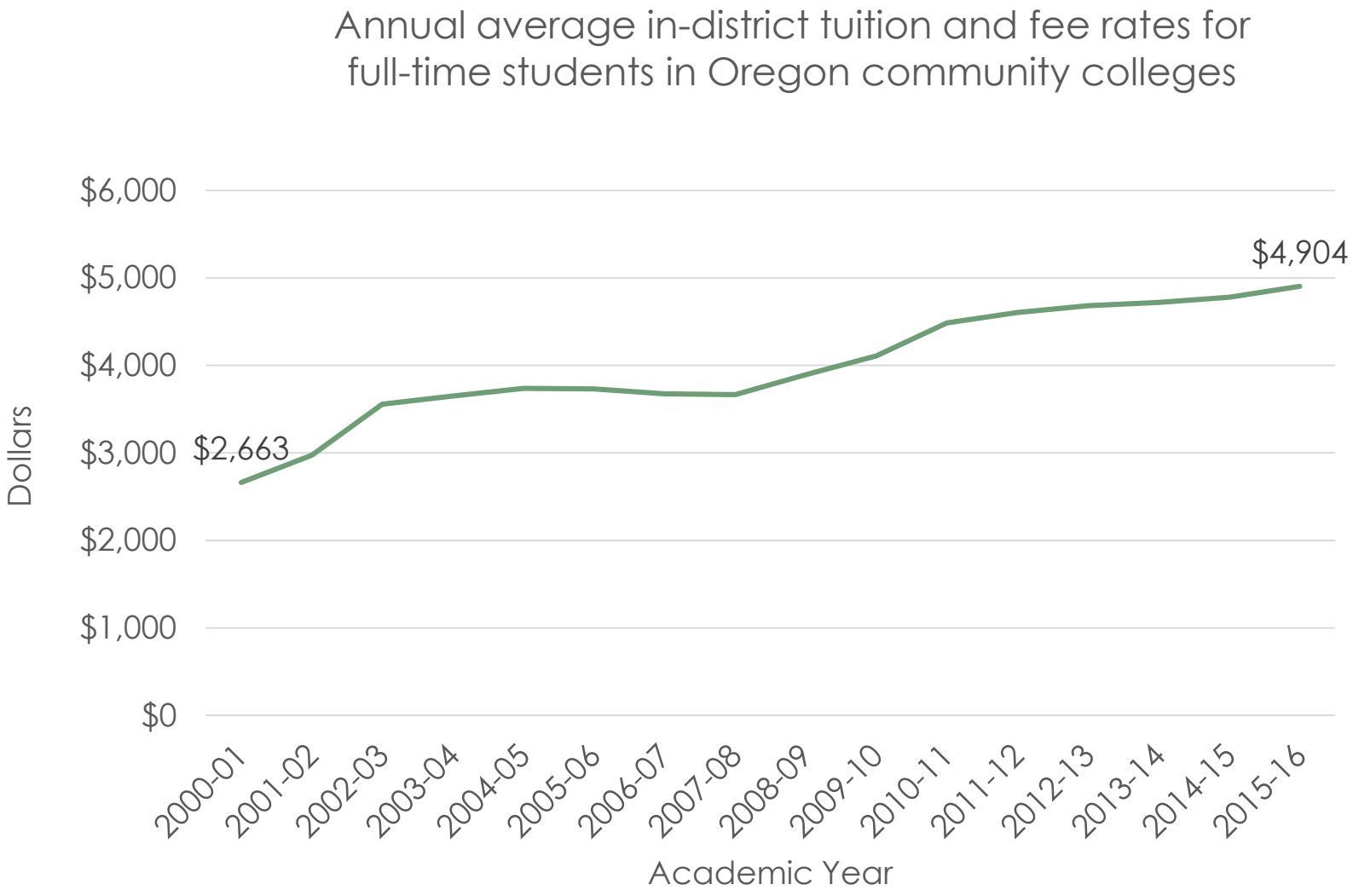
OREGON HIGHER EDUCATION: AFFORDABILITY

UNIVERSITY TUITION AND FEES OVER TIME
(ADJUSTED FOR INFLATION – 2015 DOLLARS)



Data Source: HECC

COMMUNITY COLLEGE TUITION AND FEES OVER TIME
(ADJUSTED FOR INFLATION – 2015 DOLLARS)

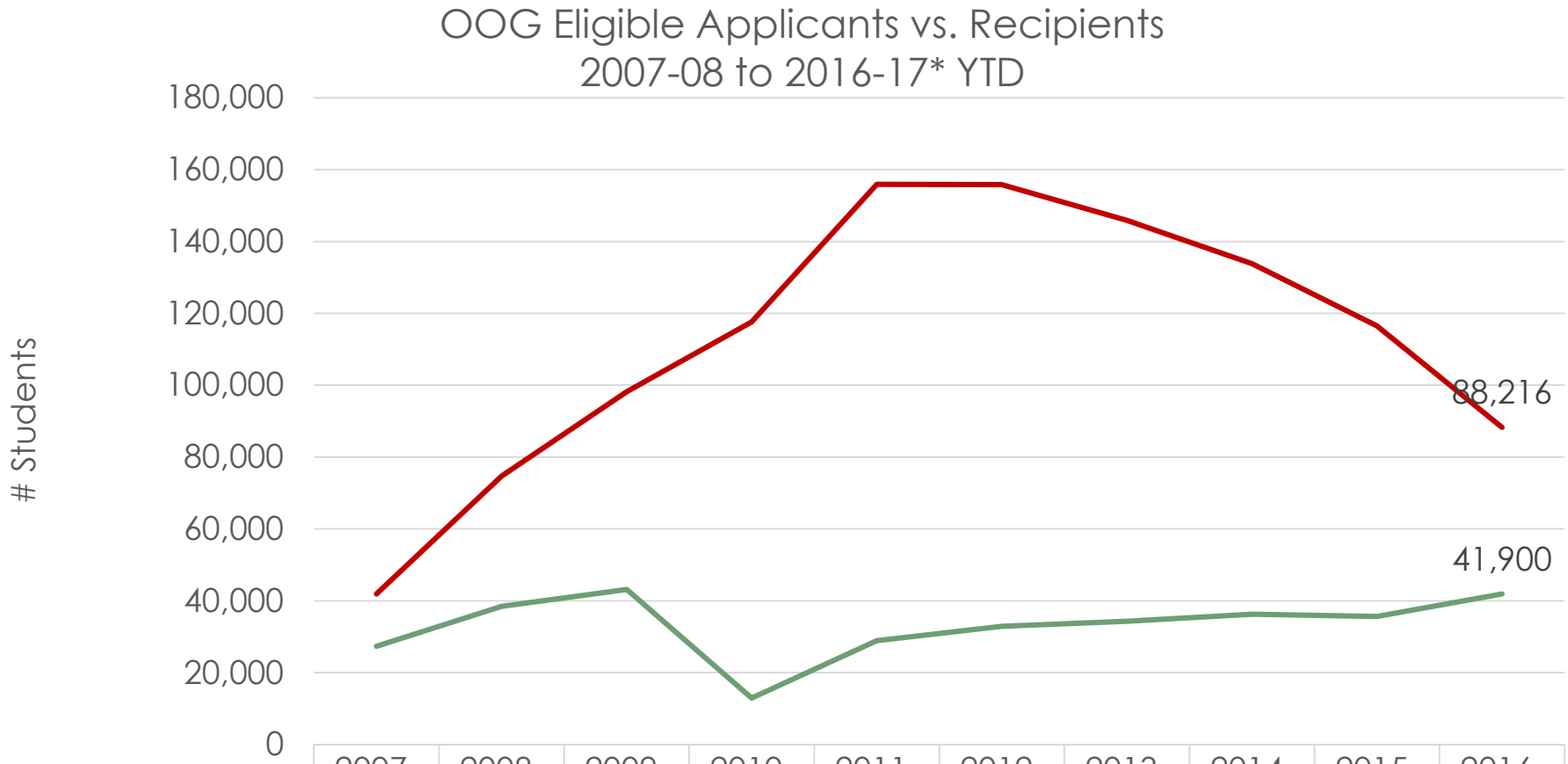


Data Source: HECC

OREGON'S STATE-ADMINISTERED FINANCIAL AID PROGRAMS

Oregon Opportunity Grant (OOG):	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.
Oregon Promise:	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.
OSAC Scholarships:	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.
Other State-administered financial aid programs:	Chafee Grant for current or former foster care youth, Childcare Grant, and more.

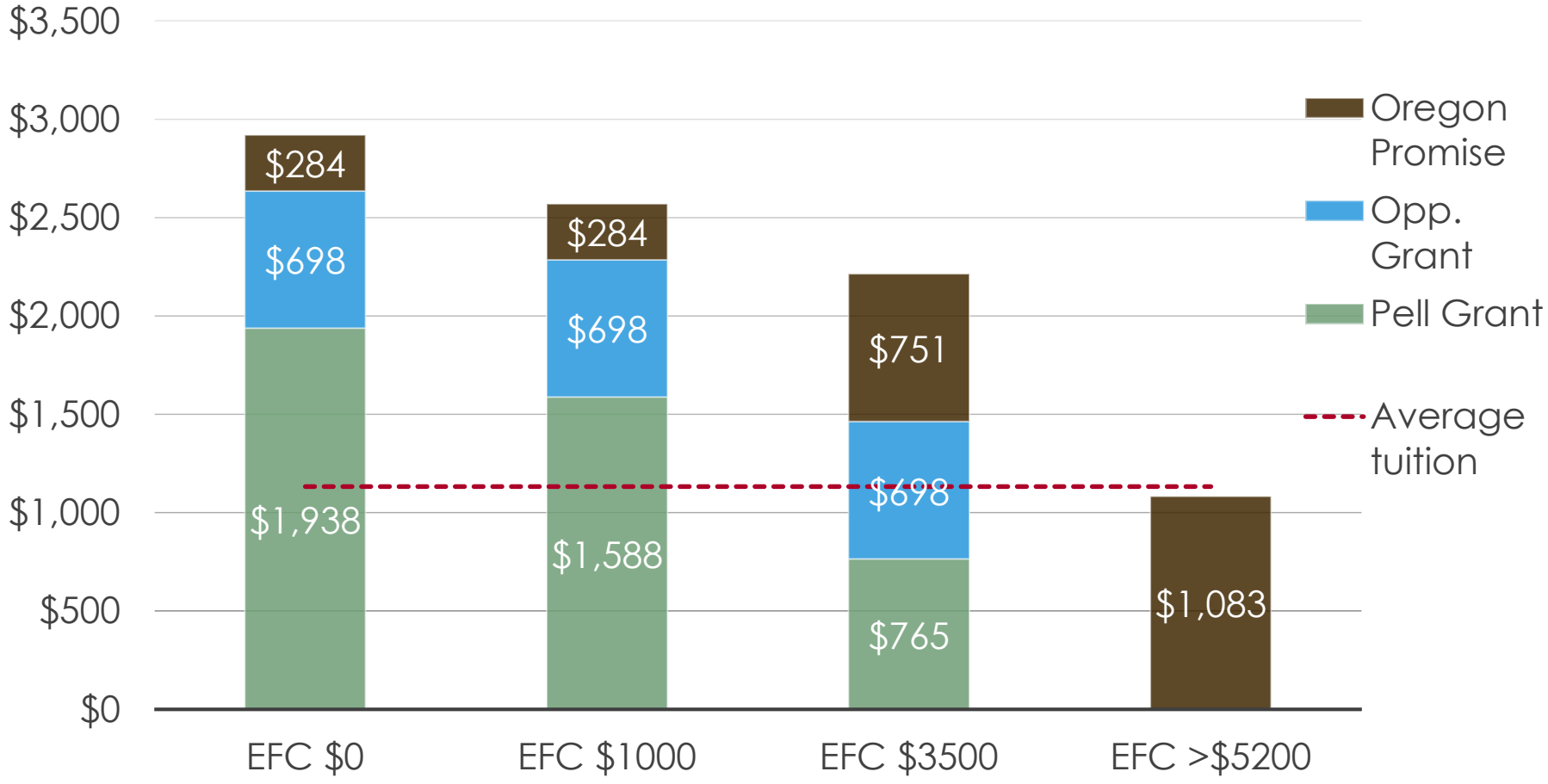
OREGON OPPORTUNITY GRANT: FUNDING GAP



	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17*
OOG Eligible	41,874	74,694	98,206	117,592	155,855	155,800	145,909	133,815	116,485	88,216
Fall Recipients	27,356	38,467	43,136	12,969	28,914	32,924	34,329	36,305	35,660	41,900

Data Source: HECC
*Year to date estimates

THE OREGON PROMISE IS A LAST-DOLLAR PROGRAM THAT BUILDS ON FEDERAL AND OTHER STATE GRANTS



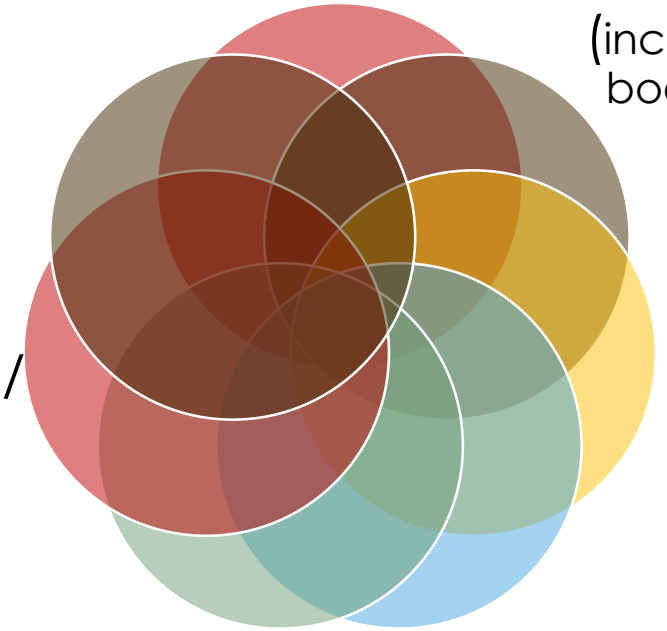
Data Source: HECC

AFFORDABILITY: NUMEROUS FACTORS

Student or family resources

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

Earnings after graduation



Type of degree/certificate/ major

Financial Aid (state, federal, institutional, private)

Time to completion

Completion

LBCC

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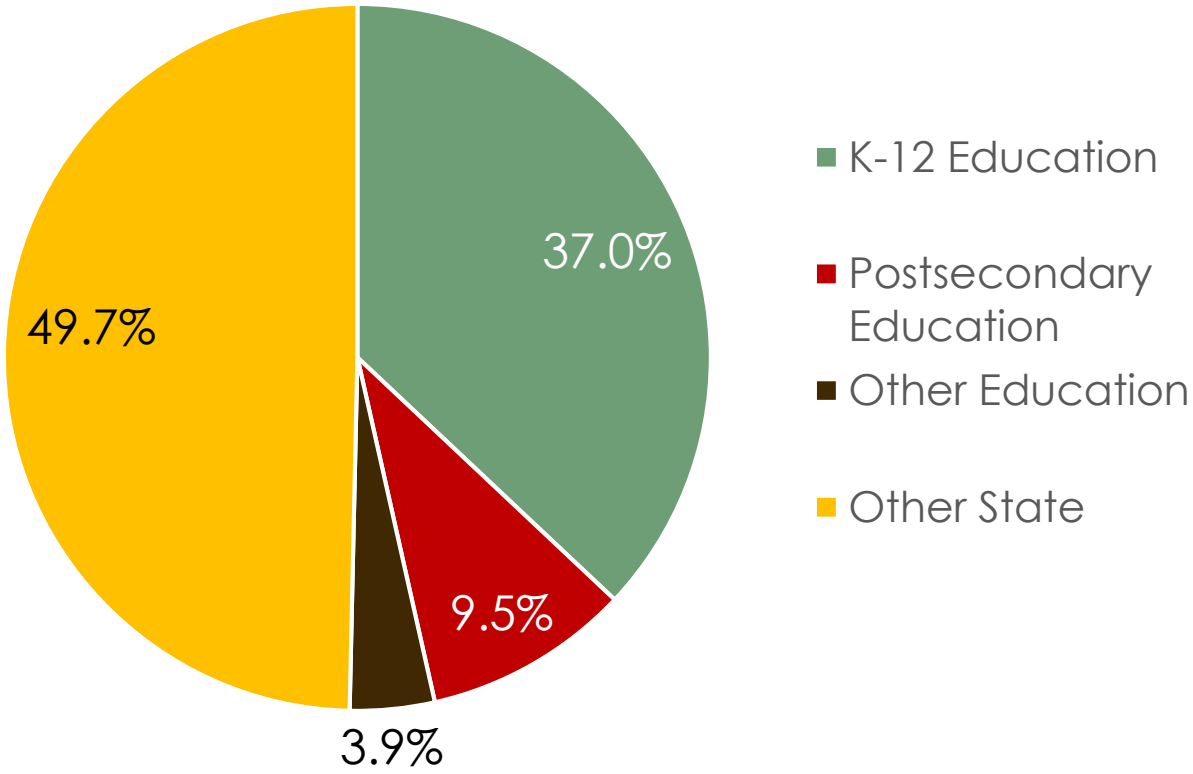
OREGON HIGHER EDUCATION: INTRODUCTION TO FUNDING HISTORY

POSTSECONDARY EDUCATION AS COMPONENT OF STATE BUDGET

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



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.

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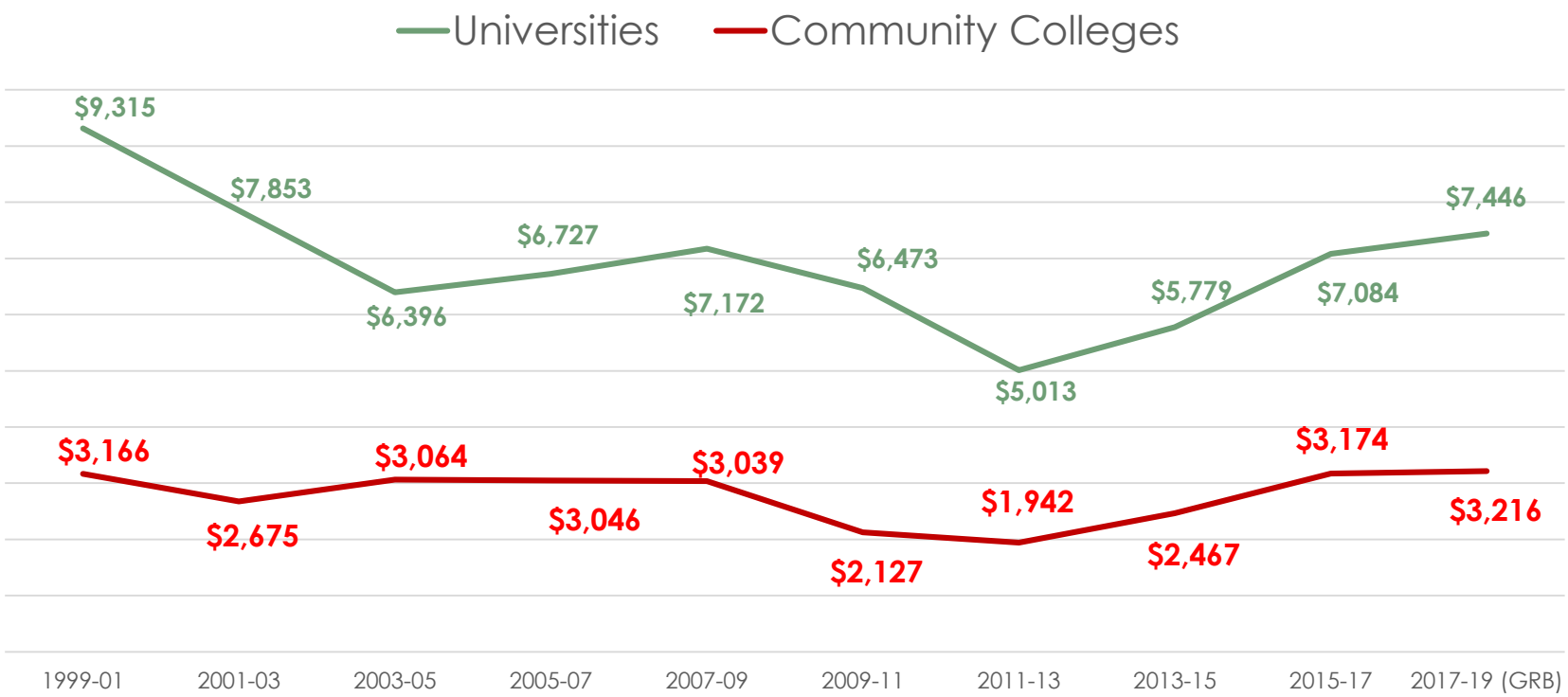
STATE APPROPRIATIONS TO PUBLIC COMMUNITY COLLEGES AND UNIVERSITIES PER STUDENT (FTE), ADJUSTED FOR INFLATION

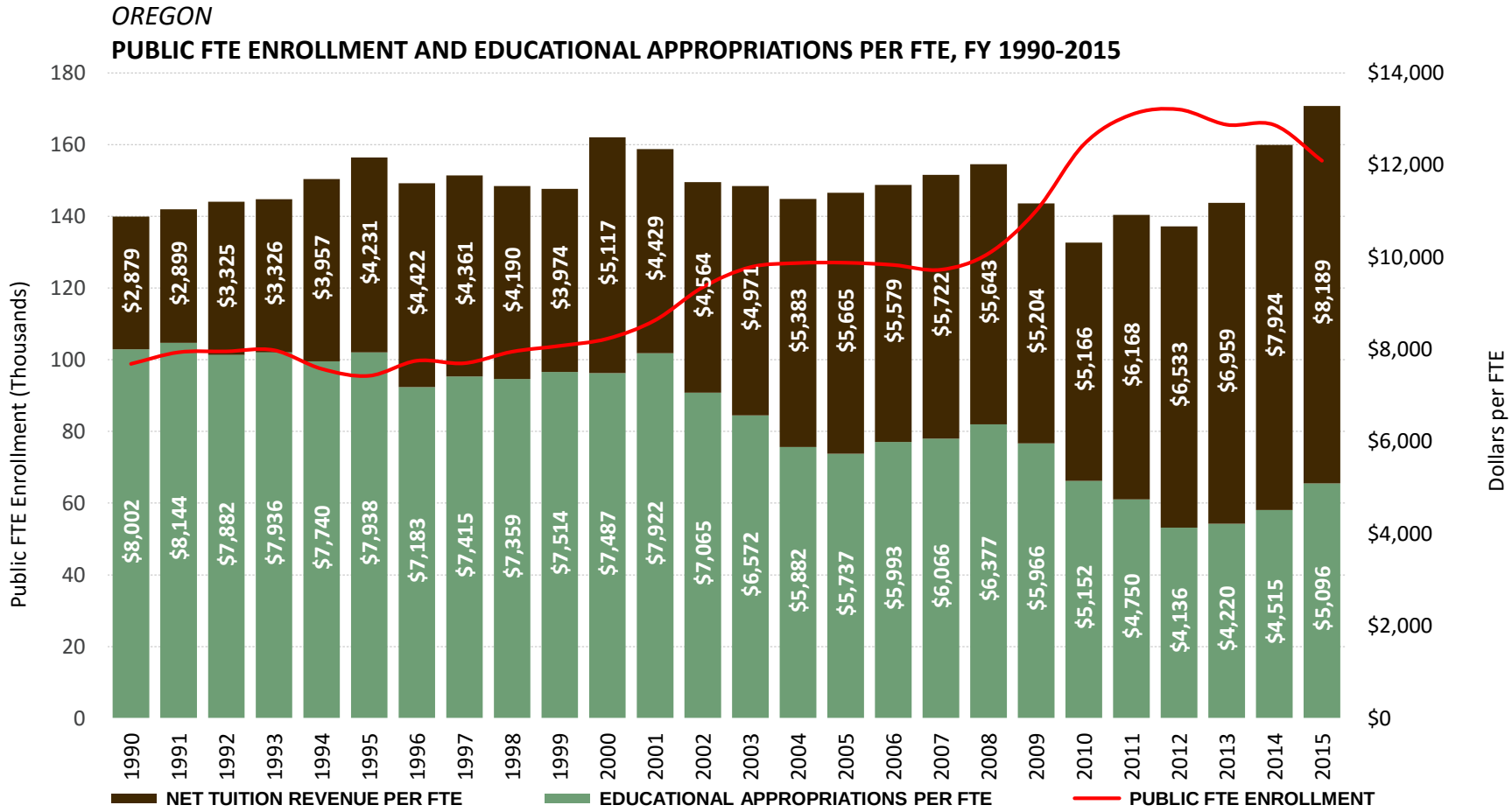


Notes:

- 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,

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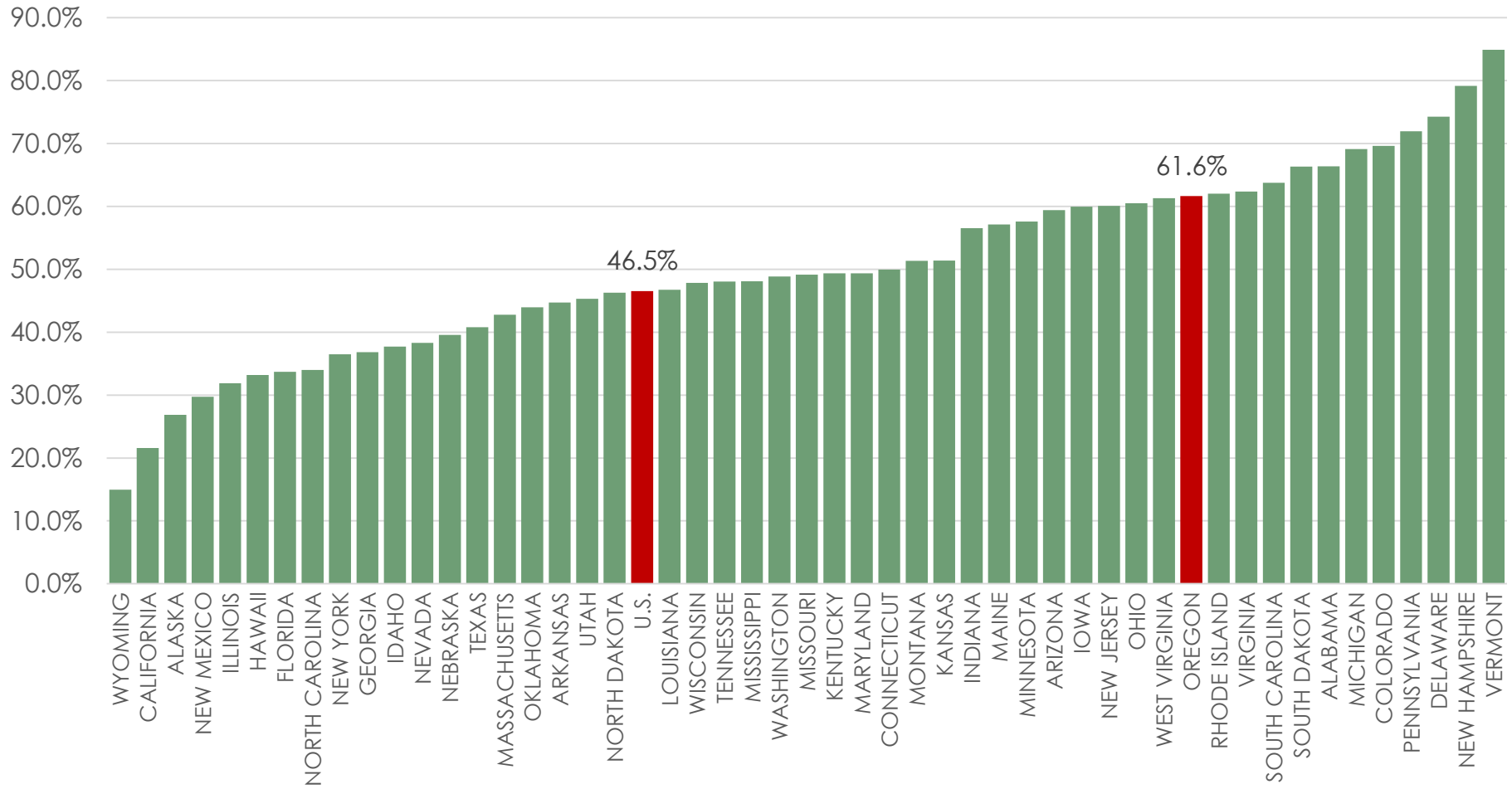
Data Source: 2015 State Higher Education Finance Report, SHEEO, http://www.sheeo.org

PUBLIC POSTSECONDARY NATIONAL COMPARISON

STUDENT SHARE: NET TUITION AS A PERCENT OFF TOTAL EDUCATIONAL REVENUE, FY 2015



Data Source: 2015 State Higher Education Finance Report, SHEEO, http://www.sheeo.org

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STATE FUNDING: NATIONAL DATA

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 kept 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.