



**OREGON EDUCATION  
INVESTMENT BOARD**

**2013-2015 GOVERNOR'S  
BALANCED BUDGET**

**Oregon Education Investment Board  
2013-15 Governor’s Balanced Budget  
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# CERTIFICATION

I hereby certify that the accompanying summary and detailed statements are true and correct to the best of my knowledge and belief and that the arithmetic accuracy of all numerical information has been verified.

Oregon Education Investment Board

AGENCY NAME

775 Court Street NE, Salem, OR 97301

AGENCY ADDRESS



SIGNATURE

Chief Education Officer

TITLE

Notice: Requests of those agencies headed by a board or commission must be approved by those bodies of official action and signed by the board or commission chairperson. The requests of other agencies must be approved and signed by the agency director or administrator.

Agency Request

Governor's Balanced Budget

Legislatively Adopted

Budget Page \_\_\_\_\_

**76<sup>th</sup> OREGON LEGISLATIVE ASSEMBLY – 2011 Regular Session  
BUDGET REPORT AND MEASURE SUMMARY**

**MEASURE: SB 5508-A**

**JOINT COMMITTEE ON WAYS AND MEANS**

**Carrier – House: Rep. Richardson  
Carrier – Senate: Sen. Devlin**

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**Action:** Do Pass as Amended and as Printed A-Engrossed

**Vote:** 24 – 0 – 1

House – Yeas: Beyer, Buckley, Cowan, Freeman, Garrard, Komp, Kotek, McLane, Nathanson, Nolan, Richardson, G. Smith, Thatcher, Whisnant  
– Nays:  
– Exc:

Senate – Yeas: Bates, Devlin, Edwards, Girod, Johnson, Monroe, Nelson, Thomsen, Whitsett, Winters  
– Nays:  
– Exc: Verger

**Prepared By:** Sheila Baker, Legislative Fiscal Office

**Reviewed By:** Daron Hill, Legislative Fiscal Office

**Meeting Date:** June 29, 2011

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<u>Agency</u>	<u>Budget Page</u>	<u>LFO Analysis Page</u>	<u>Biennium</u>
Emergency Board	L-1	263	2011-13
Various Agencies			2009-11

**2011-13 Budget Summary\***

	<u>2009-11 Legislatively Approved Budget</u>	<u>2011-13 Legislatively Adopted Budget</u>	<u>2011-13 Committee Recommendation</u>	<u>Committee Change</u>
<b><u>Emergency Board</u></b>				
General Fund - General Purpose	-	-	\$ 25,000,000	\$ 25,000,000
General Fund - Special Purpose Appropriations				
Department of Human Services/ Oregon Health Authority			\$ 8,000,000	\$ 8,000,000
Department of Justice			\$ 2,000,000	\$ 2,000,000
<b><u>Various Agencies -- see Attachment A</u></b>				
General Fund	-	-	\$ (3,802,558)	\$ (3,802,558)
General Fund Debt Service	-	-	\$ (17,335,341)	\$ (17,335,341)
Lottery Funds	-	-	\$ (72,114)	\$ (72,114)
Lottery Funds Debt Service	-	-	\$ (24,405,711)	\$ (24,405,711)
Other Funds	-	-	\$ (8,304,448)	\$ (8,304,448)
Other Funds Debt Service	-	-	\$ (25,605,072)	\$ (25,605,072)
Federal Funds	-	-	\$ (2,633,061)	\$ (2,633,061)
<b><u>ADMINISTRATION PROGRAM AREA</u></b>				
<b><u>Department of Administrative Services</u></b>				
General Fund	-	-	\$ 1,325,000	\$ 1,325,000
Lottery Funds Debt Service	-	-	\$ 903,119	\$ 903,119
Other Funds	-	-	\$ 19,514,631	\$ 19,514,631
<b><u>Office of the Governor</u></b>				
General Fund	-	-	\$ 3,000,000	\$ 3,000,000
Federal Funds	-	-	\$ 825,616	\$ 825,616
<b><u>Secretary of State</u></b>				
General Fund	-	-	\$ 80,000	\$ 80,000
Other Funds	-	-	\$ 380,312	\$ 380,312
Federal Funds	-	-	\$ 634,419	\$ 634,419

\*Excludes Capital Construction

**2011-13 Position Summary**

	<u>2009-11 Legislatively Approved Budget</u>	<u>2011-13 Legislatively Adopted Budget</u>	<u>2011-13 Committee Recommendation</u>	<u>Committee Change</u>
<b><u>Office of the Governor</u></b>				
Authorized Positions	-	-	3	3
Full-time Equivalent (FTE) positions	-	-	2.50	2.50
<b><u>Secretary of State</u></b>				
Authorized Positions	-	-	1	1
Full-time Equivalent (FTE) positions	-	-	0.50	0.50
<b><u>Department of Community Colleges and Workforce Development</u></b>				
Authorized Positions	-	-	1	1
Full-time Equivalent (FTE) positions	-	-	1.00	1.00
<b><u>Department of Education</u></b>				
Authorized Positions	-	-	1	1
Full-time Equivalent (FTE) positions	-	-	1.00	1.00
<b><u>State Commission on Children and Families</u></b>				
Authorized Positions	-	-	0	0
Full-time Equivalent (FTE) positions	-	-	(0.25)	(0.25)
<b><u>State Department of Energy</u></b>				
Authorized Positions	-	-	2	2
Full-time Equivalent (FTE) positions	-	-	2.00	2.00
<b><u>Water Resources Department</u></b>				
Authorized Positions	-	-	2	2
Full-time Equivalent (FTE) positions	-	-	2.00	2.00

## Summary of Revenue Changes

The General Fund appropriations made in the bill are within resources available as projected in the May 2011 economic and revenue forecast by the Department of Administrative Services Office of Economic Analysis, supplemented by transfers from various agency accounts to the General Fund for general governmental purposes as authorized in Senate Bill 939, plus other actions to reduce state agency expenditures.

## Summary of Capital Construction Subcommittee Action

Senate Bill 5508 appropriates General Fund to the Emergency Board for general purpose and targeted special purpose appropriations, and makes other adjustments to individual agency budget and position authority as described below.

### Emergency Board

The Emergency Board allocates General Fund and provides Lottery Funds, Other Funds, and Federal Funds expenditure limitation to state agencies for unanticipated needs in approved agency budgets when the Legislature is not in session. The Subcommittee appropriated \$25 million General Fund to the Emergency Board for general purposes.

Senate Bill 5508 makes two special purpose appropriations to the Emergency Board, totaling \$10 million General Fund:

- \$8 million General Fund for the Department of Human Services and/or the Oregon Health Authority for caseloads or costs for programs and services. This appropriation is in addition to the resources, and the special purpose appropriation to the Emergency Board, included in the budget bills for the Department of Human Services (House Bill 5030) and the Oregon Health Authority (Senate Bill 5529).
- \$2 million General Fund for the Department of Justice for: 1) the on-going legal costs associated with the state's defense of the revenue stream generated from the Master Settlement Agreement entered into with major tobacco companies; and 2) the Defense of Criminal Convictions program. This appropriation is in addition to the resources included in the budget bill for the Department of Justice (Senate Bill 5518).

If these special purpose appropriations are not allocated by the Emergency Board before December 1, 2012, any remaining funds become available to the Emergency Board for general purposes.

## Adjustments to Approved 2011-13 Budgets

### **OMNIBUS ADJUSTMENTS**

Omnibus adjustments reflect savings in multiple agencies based on reductions in Department of Administrative Services' assessments and charges for services, including the State Data Center; Secretary of State audit assessments; and Office of Administrative Hearings charges. Agencies will need to reconcile these changes in the appropriate line items with consideration for the 6.5% overall reduction in services and supplies applied to most agency budgets and reductions in uniform/self-support rent charges. Debt service costs are also adjusted based on

updated bonding information, including a net \$24.4 million reduction in Lottery Funds debt service costs. The combined results of these changes on individual agency budgets are shown in Attachment A. Total savings are \$21.1 million General Fund, \$24.5 million Lottery Funds, \$33.9 million Other Funds, and \$2.6 million Federal Funds.

## ADMINISTRATION

### Oregon Department of Administrative Services

Senate Bill 5508 includes General Fund appropriations to the Department for the following programs:

- \$100,000 for the Confluence Project, a collaborative effort of Pacific Northwest tribes, civic groups from Washington and Oregon, artists, architects, and landscape designers. Each of its seven sites along the Columbia River features an art installation interpreting the area's ecology and history.
- \$400,000 for the Boardman Health Clinic, which gives Columbia River Community Health Services the amount needed to complete the funding package for this project. The new 15,000 square foot medical facility replaces a 5,000 square foot building that can no longer expand with the existing footprint.
- \$400,000 for Southwestern Oregon Community College's Curry Campus project. The money will help finish equipping and furnishing the facility.
- \$425,000 for Port Orford to purchase a building for the planned marine reserve research and interpretive center.

The Subcommittee added \$19,514,631 Other Funds for costs of issuance and special payments associated with the distribution of proceeds from several Lottery Bond sales; projects are detailed below and approved in the Lottery Bond bill (House Bill 5036). Also included is \$903,119 Lottery Funds to cover the 2011-13 debt service on those bonds.

- \$3,251,756 Other Funds for disbursement to the Port of Morrow for the purpose of Willow Creek/Sage Center Improvements, including construction of sidewalks or other walkways. For debt service, \$173,981 Lottery Funds is approved.
- \$6,478,890 Other Funds for disbursement to the City of Hermiston for the purpose of acquiring, developing, constructing and equipping the Eastern Oregon Trade Center. For debt service, \$346,294 Lottery Funds is approved.
- \$2,950,809 Other Funds for disbursement to the Milton-Freewater Water Control District for public infrastructure improvements, including levee restoration/repair projects and bridge projects in Milton-Freewater and surrounding areas. For debt service, \$157,711 Lottery Funds is approved.
- \$2,549,322 Other Funds for disbursement to the Oregon Historical Society for payment of mortgage costs associated with the society's storage facility in Gresham. For debt service, \$225,133 Lottery Funds is approved.
- \$4,283,854 Other Funds for disbursement to the Lane Transit District for the West Eugene EmX Extension; this project supports the acquisition, construction and procurement of the components of an extension of the bus rapid transit system in west Eugene. Debt service for this project was included as part of the omnibus adjustments mentioned previously.

### Office of the Governor

The Subcommittee appropriated \$3 million General Fund and increased Federal Funds expenditure limitation by \$825,616 for the purpose of implementing Senate Bill 909, which creates the Oregon Education Investment Board and the Early Learning Council. Three positions (2.50 FTE) were also approved: a Chief Investment Officer and Early Learning Systems Director (both Principal Executive/Manager G) and one half-



time Executive Support Specialist 2. An estimated \$354,067 General Fund will be spent on Personal Services and services and supplies. The Governor's Office anticipates expending the balance of the General Fund resources for professional services contracts for change management, development of a school-readiness assessment tool, and development of a comprehensive early childhood education and care budget. The federal funds, from the federal State Early Childhood Advisory Council grant received during the 2009-11 biennium, will support the Early Learning System Director, the half-time executive support position, associated services and supplies and Professional Services costs for the work of the Early Learning Council.

#### Secretary of State

The budget for the Secretary of State is increased by \$80,000 General Fund for House Bill 2257, which expands electronic filing requirements of statements to the Elections Division; by \$380,312 Other Funds for House Bill 3247, which requires the agency to establish the "One Stop Shop for Oregon Business" internet portal; and by \$634,419 Federal Funds for two federal grants, with the understanding that the Department of Administrative Services will unschedule the Federal Funds expenditure limitation pending award of the grants. One limited-duration Operations and Policy Analyst 2 position (0.50 FTE) is also established for development of the internet portal. The General Fund appropriation is to finance one-time costs and will be phased out in development of the agency's 2013-15 biennium budget. All but \$75,000 of the Other Funds for the internet portal will also be phased out in the development of the 2013-15 biennium budget. The remaining \$75,000 is projected to cover the ongoing maintenance costs of the internet portal.

### **CONSUMER AND BUSINESS SERVICES**

#### Oregon Health Licensing Agency

The Subcommittee approved \$46,356 Other Funds expenditure limitation to support licensing and regulatory oversight of Polysomnographic Technologists within the Respiratory Therapist and Polysomnographic Technologist Licensing Board, as established in Senate Bill 723. The Other Funds revenue results from applications, licensure, renewals, and other fees associated with licensing the Polysomnographic Technologists.

#### Real Estate Agency

The Other Funds expenditure limitation for the agency is increased by \$496,400 to cover expenses for an online licensing system. The agency received a \$500,000 limitation for this project during the 2009-11 biennium. However, due to delays in project implementation, vendor payments will not be made until the first quarter of the 2011-13 biennium.

### **ECONOMIC AND COMMUNITY DEVELOPMENT**

#### Oregon Business Development Department

Senate Bill 5508 establishes \$1.3 million in new Lottery Funds expenditure limitation for the Department. Of this amount, \$1 million is established for identifying regional governance solutions to improve economic development opportunities and for developing a West Coast strategy to create jobs while reducing carbon emissions and the costs of doing business by retrofitting and redesigning the built environment. The remaining \$300,000 is established for a pilot project providing economic gardening services. An additional \$106,207 Other Funds expenditure limitation is provided for payment of costs to issue lottery revenue bonds for the Department. Bond proceeds will provide the source

SENATE BILL 5508-A  
ATTACHMENT A: 2011-13 Agency Adjustments

Agency Name	Appropriation Description	Bill Number	Section/ Sub	Fund	General Fund	Lottery Funds	Other Funds	Federal Funds
<b>ADMINISTRATION</b>								
ADVOCACY COMMISSIONS OFFICE	Operating Expenses	HB 5001	01	GF	(229)	-	-	-
DEPT OF ADMIN SERVICES	Mill Creek Debt Service	SB 5502	01-02	GF	(114,267)	-	-	-
DEPT OF ADMIN SERVICES	Operating Expenses	SB 5502	02-01	OF	-	-	(1,039,691)	-
DEPT OF ADMIN SERVICES	Debt Service (Other)	SB 5502	02-05	OF	-	-	(625,330)	-
DEPT OF ADMIN SERVICES	Debt Service - OPB	SB 5502	03-01	LF	-	(311,063)	-	-
DEPT OF ADMIN SERVICES	Debt Service - Tillamook FEMA Match	SB 5502	03-06	LF	-	(559,068)	-	-
DEPT OF ADMIN SERVICES	Debt Service - Lane Transit District EmX	SB 5502	03-07	LF	-	238,158	-	-
OREGON STATE TREASURY	Administrative Expenses - Operations	HB 5048	01-01	OF	-	-	(92,844)	-
OREGON STATE TREASURY	Administrative Expenses - College Savings	HB 5048	01-02	OF	-	-	(3,362)	-
RACING COMMISSION	Operating Expenses	SB 5543	01	OF	-	-	(48,788)	-
PUB EMPLOYEES RETIREMNT SYSTEM	Administrative and operating expenses	HB 5039	01-01	OF	-	-	(34,511)	-
SECRETARY OF STATE	Executive Office, BSD, ISD, HRD	HB 5041	01-01	GF	(249)	-	-	-
SECRETARY OF STATE	Elections Division	HB 5041	01-02	GF	(6,380)	-	-	-
SECRETARY OF STATE	Archives Division	HB 5041	01-03	GF	(404)	-	-	-
SECRETARY OF STATE	Executive Office, BSD, ISD, HRD	HB 5041	02-01	OF	-	-	(2,390)	-
SECRETARY OF STATE	Audits Division	HB 5041	02-03	OF	-	-	(4,419)	-
SECRETARY OF STATE	Archives Division	HB 5041	02-04	OF	-	-	(122)	-
SECRETARY OF STATE	Corporation Division	HB 5041	02-05	OF	-	-	10,191	-
SECRETARY OF STATE	Help America Vote Act	HB 5041	03	FF	-	-	-	(45)
LIQUOR CONTROL COMMISSION	Administrative expenses	SB 5522	01-01	OF	-	-	6,755	-
DEPT OF REVENUE	Administrative Expenses	HB 5040	01	GF	(259,006)	-	-	-
DEPT OF REVENUE	Operating Expenses	HB 5040	02	OF	-	-	(56,229)	-
EMPLOYMENT RELATIONS BOARD	Assessments of agencies transferred to DAS	SB 5510	03	OF	-	-	(1,811)	-
OFFICE OF THE GOVERNOR	Operating Expenses	HB 5025	01	GF	(8,746)	-	-	-
OFFICE OF THE GOVERNOR	Economic Revitalization Team	HB 5025	03	LF	-	(943)	-	-
OFFICE OF THE GOVERNOR	Operating Expenses	HB 5025	04	OF	-	-	(862)	-
GOVERNMENT ETHICS COMMISSION	Other Funds	HB 5024	01	OF	-	-	(1,354)	-
OREGON STATE LIBRARY	Operating Expenses	SB 5521	01	GF	(1,859)	-	-	-
OREGON STATE LIBRARY	Operating Expenses - Assessments	SB 5521	03	OF	-	-	(2,711)	-
OREGON STATE LIBRARY	Operating Expenses - Non-Assessment	SB 5521	02	OF	-	-	(71)	-
OREGON STATE LIBRARY	Operating Expenses	SB 5521	04	FF	-	-	-	(1,776)
<b>CONSUMER AND BUSINESS SERVICES</b>								
STATE BOARD OF ACCOUNTANCY	Operating Expenses	SB 5501	01	OF	-	-	(9,129)	-
TAX PRACTITIONERS BOARD	Operating Expenses	HB 5044	01	OF	-	-	(3,095)	-
CONSTRUCTION CONTRACTOR BOARD	Operating Expenses	HB 5012	01	OF	-	-	(10,154)	-
COUNSELORS AND THERAPISTS BRD	Operating Expenses	HB 5015	01	OF	-	-	1,195	-
PSYCHOLOGISTS EXAMINERS BOARD	Operating Expenses	HB 5038	01	OF	-	-	(42,775)	-
CHIROPRACTIC EXAMINERS BOARD	Operating Expenses	HB 5007	01	OF	-	-	3,255	-
CLINICAL SOCIAL WORKERS BOARD	Operating Expenses	HB 5008	01	OF	-	-	(441)	-
OREGON BOARD OF DENTISTRY	Operating Expenses	HB 5017	01	OF	-	-	(7,473)	-
HEALTH RELATED LICENSING BRDS	State Mortuary and Cemetary Board	HB 5028	02	OF	-	-	10,034	-
HEALTH RELATED LICENSING BRDS	Board of Naturopathic Examiners	HB 5028	03	OF	-	-	11,026	-
HEALTH RELATED LICENSING BRDS	Occupational Therapy Licensing Board	HB 5028	04	OF	-	-	(207)	-
HEALTH RELATED LICENSING BRDS	Board of Medical Imaging	HB 5028	05	OF	-	-	(4,822)	-
HEALTH RELATED LICENSING BRDS	State Board of Examiners for Speech-Language Pathology and Audiology	HB 5028	06	OF	-	-	1,452	-

# ORBITS Budget Narrative

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## Oregon Education Investment Board

### Agency Summary

Senate Bill 909 (2011) created the Oregon Education Investment Board (OEIB), a 13-member board chaired by the Governor, to ensure that all students in the state reach the education outcomes established for the state. To accomplish this purpose, SB 909 contained strategies to develop a unified public education system from early childhood through K-12 and postsecondary education and to use strategic investments to achieve the state's education outcomes. The Legislature appropriated \$3 million to the Governor's Office for the establishment and operation of the OEIB and staff.

Senate Bill 253 (2011) defined those outcomes to include the —40/20” goals for high school and college completion by 2025. Passage of this bill signaled the state's intention to develop one of the best-educated citizenries in the world with the goal that by 2025, 100 percent of Oregon students will have earned an education degree that represents attainment of a quality education. Specifically, the state will achieve the following for Oregonians in 2025: 40 percent of adult Oregonians will have earned a bachelor's degree or higher; 40 percent of adult Oregonians will have earned an associate's degree or postsecondary credential as their highest level of education attainment; and 20 percent of all adult Oregonians will have earned at least a high school diploma, an extended or modified high school diploma, or the equivalent of a high school diploma as their highest level of education attainment. These goals must be achieved equitably, with Oregon's diversity equally well-represented in each stage.

In 2012, as directed by SB 909, the OEIB board hired Dr. Rudy Crew to be Oregon's first Chief Education Officer (CEdO). The CEdO created a small department within the Governor's office. This session, the Governor has recommended that the Legislature approve the creation of a small, stand-alone agency known as the Oregon Education Investment Board. The Governor recommends that the OEIB be comprised of the CEdO, a small professional staff, and a P-20 Policy & Research Consortium, with policy direction provided by the OEIB Board.

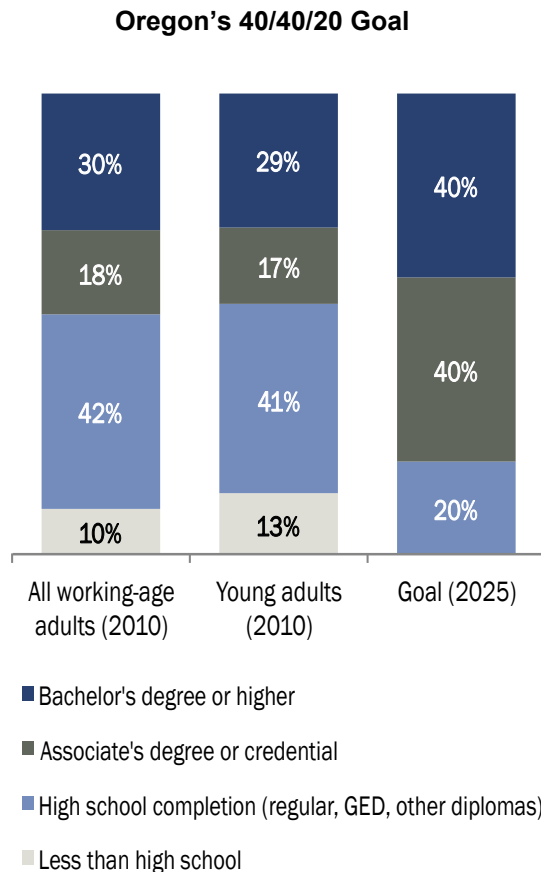
The OEIB's overarching outcome is to ensure all Oregonians are prepared for lifelong learning, rewarding work, and engaged citizenship. Never before has this goal been more important to the lives and well-being of Oregonians and its communities. Education cements shared values, enriches culture and expands the personal horizons of individuals. Education advances family life, civic stability and democratic ideals. It provides opportunity for all, no matter their race, home language, disability or family income.

Further, as knowledge and innovation become the prime capital in this global economy, education increasingly determines the fortunes of individuals, communities and nations. Each year, well-paid jobs requiring only a high school diploma—the millwork or manufacturing

# ORBITS Budget Narrative

jobs of the past—are replaced with new jobs that increasingly demand post-secondary education, technology skills and advanced training above the high school level. The shift is happening quickly. Over the next decade, 61 percent of all Oregon jobs will require a technical certificate, associate’s degree or higher level of education. This proportion will only accelerate by 2025. Today, Oregonians with associate’s degrees earn at least \$5,000 per year more than those with just a high school diploma. Those with bachelor’s degrees earn approximately \$17,000 more per year. Eighty-nine percent of family wage jobs—jobs paying more than \$18 per hour—will require a technical certificate/associate’s degree or higher level of education. Students emerging into this market need skills and education to

**Figure 1. Current educational attainment of Oregon adults\* versus the 40/40/20 Goal**



compete and therefore need to complete a post-secondary education. To revitalize Oregon’s economy, the workforce needs higher levels of knowledge and skills than ever before. The task of improving Oregon’s education system is as daunting as it is imperative. Every year, 40,000 children are born in Oregon. Of those, roughly 40 percent are exposed to a well-recognized set of socio-economic, physical or relational risk factors that adversely affect their ability to develop the foundations of school success. Oregon’s cohort graduation rate tells us the percentage of students who entered high schools— as freshman or as later arrivals—that graduated with a regular diploma in four or five years. From that measure, in 2011, only 67 percent of Oregon students graduated on-time in four years, and only a total of 70 percent graduated in five years. Looking at a more expansive measure of students who earned a regular diploma, modified diploma or GED, one in five students (21 percent) still does not complete within five years. And far too many Oregon students don’t even get captured in the cohort graduation or federal dropout rates because they leave school even before the ninth-grade starting point for those calculations.

Currently, Oregon ranks 47<sup>th</sup> among states in the share of high school graduates who head to college, with only about half of students enrolling. Oregon’s current generation of young adults—ages 25-34—is less educated than their parents’ generation, with fewer earning a certificate or degree beyond high school. In addition to being less educated than older Oregonians, this generation is less educated than the national average and is falling behind compared to other countries. Currently, only about 46 percent of young Oregonians have a post-secondary degree or certificate.

Perhaps the most pressing issue faced by Oregon is that, on nearly all these measures, the achievement rates for low-income learners, English language learners, special education students and students of color are significantly lower as compared to the general student population. Oregon’s next generation, those of school and preschool ages, include greater

## ORBITS Budget Narrative

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proportions of students of color, students who are not native English speakers, and students from economically disadvantaged households. It is vital to ensure student success among all populations across the continuum through a focus on Oregon's changing demographics and demonstrated ability to well-serve the needs of all student populations and the growing percentage of Oregon's high school graduates needing basic skills upon entry into community college.

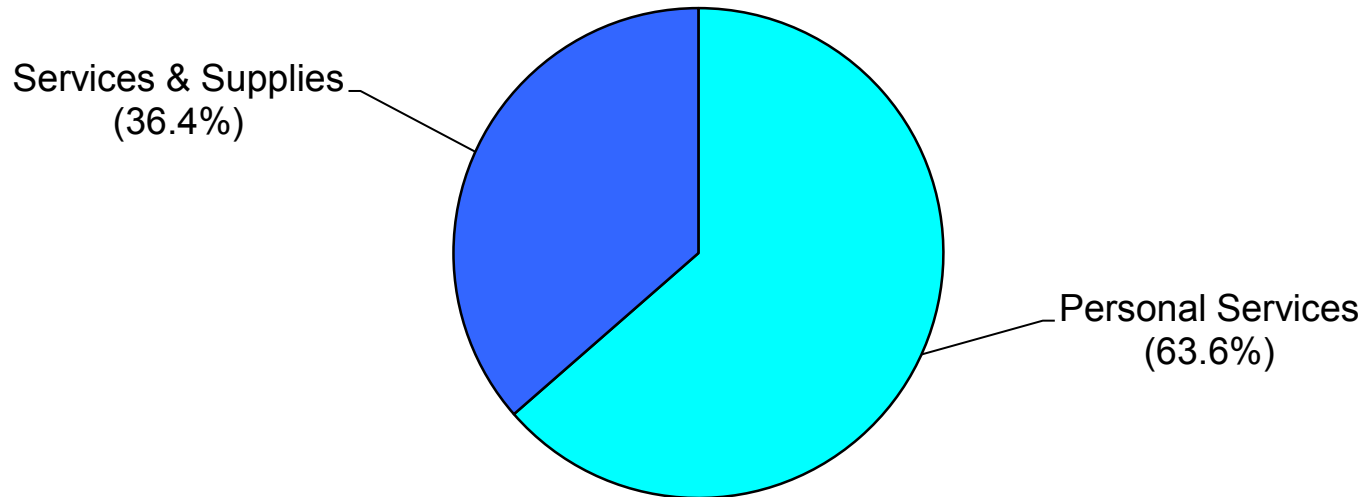
Senate Bill 1581 (2012) required all of the state's education entities to enter into an annual achievement compact with the Oregon Education Investment Board beginning with the 2012-13 school year. The achievement compacts represent a shared commitment by the State and each education entity to achieve ambitious, but attainable interim steps in the trajectory towards the 40/40/20 goals. The compacts expect each education entity to adopt transformational practices, policies, and budgets. To aid this effort, the State must (1) build a learning continuum, rather than a collection of disconnected institutional silos, (2) align funding with the levels, strategies, and practices that produce the necessary outcomes, experienced equitably, (3) ensure that Oregon's educators are well-prepared and well-supported, (4) remove barriers to local innovation, (5) identify, support, and if necessary, intervene to improve struggling education entities, (6) research, identify and disseminate best practices, and (7) along with education entities and other partners, engage in two-way communication with the public about these efforts.

*\* Working-age adults are 25-64 years old; young adults are 25-34 years old. According to census data, 87 percent of young Oregonians reported having a high school degree. This may be because they completed high school later in life or, given the high numbers of educated people who move into Oregon, even more likely that represents many who obtained their diploma in other states or countries. Source: ECONorthwest analysis of data from the U.S. Census Bureau (American Community Survey), the Oregon Department of Education, and the National Student Clearinghouse.*

# Oregon Education Investment Board

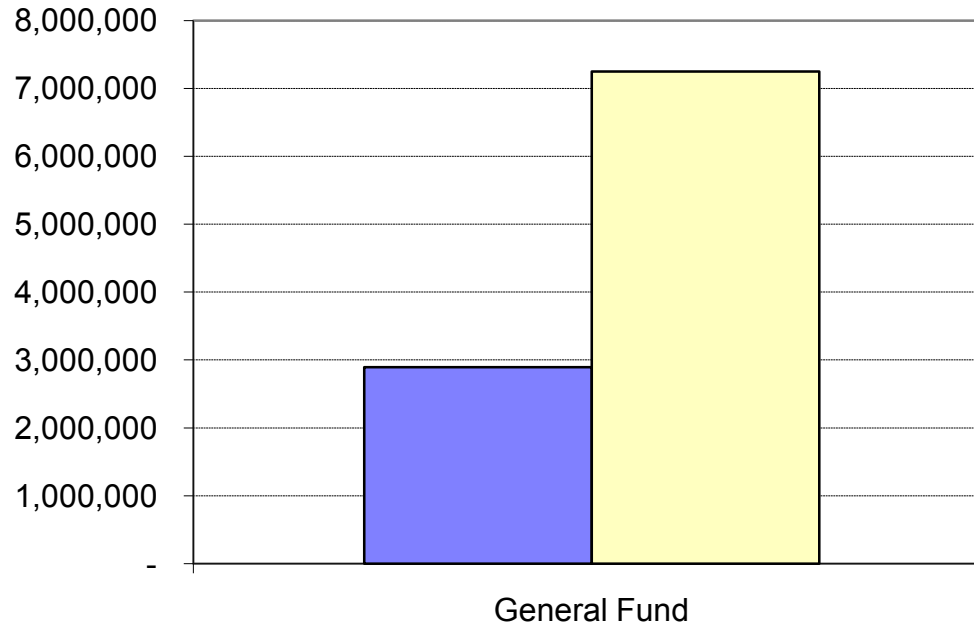
## 2013-15 Governor's Balanced Budget

### General Fund



# Oregon Education Investment Board

## 2011-13 LAB\* vs 2013-15 GBB



■ 2011-13 LAB  
□ 2013-15 GBB

\*11-13 LAB OEIB was a program within the Governor's Office

# ORBITS Budget Narrative

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## **Mission Statement**

So that the destiny of Oregon's children shall not fall to the conundrum of fiscal challenges or ideological division, the Oregon Education Investment Board will mobilize its effort around a vision that will use the statutory right to create, invest in, align and build a P-20 system and the moral authority to influence, convene, report, and measure the conditions of student success.

## **Statutory Authority**

The OEIB Board was created and charged with hiring a CEdO pursuant to Chapter 510, Oregon laws 2011, Sec. 1 & 2 (SB 909). The authority for the CEdO to direct and control the creation of a unified system of education was established by Chapter 36, Oregon laws, Section 14 (SB 1581). A bill creating OEIB as a separate agency will be introduced in the 2013 Legislative Session.



# ORBITS Budget Narrative

## Agency 2-year Plan

### Objectives

**Design and implement P-20 structure**

**Design/ implement\* initiatives to improve student achievement**

**Affect policies for initiatives and “loose/tight” direction**

**Create outcome-based budget, aligned to initiatives**

**Build an informed, engaged public**

### Initiatives/Outcomes

- P-20 integration
- Common, aligned standards, assessments, and support systems
- Longitudinal data system

- Initiatives that directly affect student learning along the P-20 continuum
- Systems and cultures that address equity and result in learning environments that address needs of all learners
- Accountability systems
- Impact analysis of initiatives

- Policies that affect/ support achievement initiatives
- Policy framework consistent with “loose/tight” direction
- Policies that lessen compliance burden

- Multi-year strategic plan with outcomes and metrics
- Biennium budget aligned with plan and outcomes

- Channels of two-way communication
- Regional collaborations/ commitment to outcomes of Achievement Compacts
- Tools and practices for field to engage communities

\* Implementation includes establishing and conducting the protocols and processes of distributing resources to the field.

## ORBITS Budget Narrative

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### Metrics for Objective 1: Complete design and implement P-20 structure

#### OEIB Initiative

#### OEIB Metric (June '15)

A) Specify how to operationalize P-20 integration, particularly around governance and structure

Structure 100% designed, legislation passed, structure fully implemented  
100% of regions report increased satisfaction in support from OEIB

B) Implement common aligned learning standards, assessment tools, and support systems for P-20

Learning standards and assessment tools are compatible, integrated, and span across P-20

C) Complete longitudinal data system

Longitudinal data system is 100% complete and serves the functions identified by end users

## ORBITS Budget Narrative

### Metrics for Objective 2: Design and implement high-impact, cost-effective initiatives that improve achievement of all students

#### OEIB Initiative

A) Implement initiatives that directly affect student learning in all segments of P-20

#### OEIB Metric (June '15)

##### Early Learning and Literacy:

- *Number of children ready to enter Kindergarten increases 20%\**
- *Number of 3rd graders reading at grade level increases 15% and achievement gap decreases 5%*
- Number of underserved families who engage **meaningfully in their child's education** is no less than 50%\*



#### **Key Strategies**

- Early childhood education redesign
- Regional hubs
- Expanded/individual learning time
- Increased library usage
- Literacy awareness campaign

\* Baseline not available prior to January 2013 OEIB Board meeting. Targets may change once baseline is established. Note: Italicized metrics are also reflected in the K-12 Achievement Compacts.

## ORBITS Budget Narrative

### Metrics for Objective 2: Design and implement high-impact, cost-effective initiatives that improve achievement of all students (cont.)

#### OEIB Initiative

A) Implement initiatives that directly affect student learning in all segments of P-20

#### OEIB Metric (June '15)

##### Diverse Professional Corps of Educators:

- Number of education professionals (PK-12) projected to enter OR education workforce within two years who are non-white, non-Hispanic or whose native language is not English increases 10%\*
- Levels of employer satisfaction with new teachers prepared in OR increases 30%\*
- At least 30% more educators report increased satisfaction in professional support/development\*
- Early childhood educators who achieve AA or higher on OR Registry increases 30%

#### **Key Strategies**

Statewide effort to recruit, prepare, and support educators:

- Four to six professional development centers
- New career maps and licensure structures
- Teacher collaboration and mentorship
- Dissemination of best practices and models
- Focus on early educators and post-secondary faculty

\* Baseline not available prior to January 2013 OEIB Board meeting.  
Targets may change once baseline is established.

## ORBITS Budget Narrative

### Metrics for Objective 2: Design and implement high-impact, cost-effective initiatives that improve achievement of all students (cont.)

#### OEIB Initiative

A) Implement initiatives that directly affect student learning in all segments of P-20

#### OEIB Metric (June '15)

##### Connecting to the World of Work:

- *Number of students who demonstrate proficiency in math and science in Middle School increases 15% and achievement gap decreases 5%*
- *At least 65% of students who graduate HS earned nine or more college credits and the achievement gap decreases 5%\**
- At least 90% of students who graduate from OR education system are employed within 12 months\*



#### **Key Strategies**

- STEM initiatives – e.g., STEM schools
- Internships and apprenticeships for students
- Grade 11-14 redesign and dual enrollment
- Essential skills curriculum
- Connections to career and technical trade unions
- Integration of arts into curriculum

\* Baseline not available prior to January 2013 OEIB Board meeting. Targets may change once baseline is established. Note: Italicized metrics are also reflected in the K-12 Achievement Compacts.

## ORBITS Budget Narrative

### Metrics for Objective 2: Design and implement high-impact, cost-effective initiatives that improve achievement of all students (cont.)

#### OEIB Initiative

A) Implement initiatives that directly affect student learning in all segments of P-20

#### OEIB Metric (June '15)

##### Post-Secondary Aspirations:

- At least 85% of students will be on track for graduation by the end of 9th grade with no gaps greater than 10%\*
- *Five-year cohort graduation rate increases 5 percentage points and achievement gap decreases 5%*
- *Post-secondary enrollment of underserved students increases 10 percentage points (gap eliminated)*



#### **Key Strategies**

- Transitional supports at critical entry points (K-20)
- Advanced Placement course offerings
- Services for at-risk youth
- Credits universally accepted throughout OU system
- Increase of post-secondary access and retention

\* Baseline not available prior to January 2013 OEIB Board meeting. Targets may change once baseline is established. Note: Italicized metrics are also reflected in the K-12 Achievement Compacts.

## ORBITS Budget Narrative

### Metrics for Objective 2: Design and implement high-impact, cost-effective initiatives that improve achievement of all students (cont.)

#### OEIB Initiative

B) Shift systems and cultures to address equity and result in learning environments that address needs of all learners

#### OEIB Metric (June '15)

*At least 75% of Priority and Focus schools will achieve growth for all students and for subgroups greater than the state average*

Number of students who have or are receiving ELL services reading at grade level by 5<sup>th</sup> grade increases 75%



#### **Key Strategies**

- Reengagement of hard-to-reach youth (immigrants, homeless, dropouts, and gangs)
- West Coast network to elevate and share tools and talent for immediate and continued growth of ELL
- Intense support of and guidance to Priority and Focus Schools
- Policy and planning documents for dissemination throughout PK-12 leadership
- Focus on reducing need for, while improving quality of, post-secondary developmental education

\* Baseline not available prior to January 2013 OEIB Board meeting. Targets may change once baseline is established. Note: Italicized metrics are also reflected in the K-12 Achievement Compacts.

## ORBITS Budget Narrative

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### Metrics for Objective 2: Design and implement high-impact, cost-effective initiatives that improve achievement of all students (cont.)

#### OEIB Initiative

C) Determine and implement processes of support and accountability (including Achievement Compacts and OR Report Card)

D) Analyze initiatives to understand impact and ROI

#### OEIB Metric (June '15)

Data from accountability system is used to affect policy and change practice  
At least 80% of educators, students, and families surveyed report accountability system as useful\*

100% of key initiatives are analyzed for impact and ROI  
ROI information is used to develop policies and recommend strategic investments

\* Baseline not available prior to January 2013 OEIB Board meeting. Targets may change once baseline is established. Note: Italicized metrics are also reflected in the K-12 Achievement Compacts.



## ORBITS Budget Narrative

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### Metrics for Objective 3: Assess, write, and respond to policies needed to accomplish initiatives and create “tight/loose” direction of Oregon Learns

#### OEIB Initiative

- A) Analyze, write, and advocate policies that support initiatives and affect how education is delivered in the field
- B) Create policy framework, including R&D, consistent with “tight/loose” direction
- C) Review current policies with eye towards which should be eliminated to achieve initiatives and lessen compliance burden

#### OEIB Metric (June '15)

Policies, explicitly linked to strategic initiatives, demonstrate impact on student performance. Policies affected/created are regarding:

- ESD redesign
- Educator workforce (licensure, minority recruitment)
- Grade 11-14 redesign (funding formula, credit transferability)
- Equity (data collection, accountability)
- Early learning (hubs, Kindergarten readiness, subsidy policy)
- Diploma and credentials (Oregon diploma rollout, career pathways)
- Mandate relief

## ORBITS Budget Narrative

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### **Metrics for Objective 4: Create outcome-based budget, aligned to student achievement initiatives**

#### **OEIB Initiative**

A) Create, monitor, and revise the strategic and operations plan (including metrics)

B) Contribute to the development of the biennium budget, tying budget to strategic initiatives

#### **OEIB Metric (June '15)**

Strategic plan and metrics are monitored at least biannually, and updated and shared at least annually

Multi-year strategic plan and metrics for 2015 and beyond is created (see pgs 7-8 for seven-year view)

Budget recommendations are developed, explicitly aligned to strategic initiatives and outcomes, and delivered on time

## ORBITS Budget Narrative

### Metrics for Objective 5: Work to build an informed, motivated, and engaged public

#### OEIB Initiative

A) Create channels of two-way communication with major stakeholders about the need for change, strategies, and opportunities for engagement

B) Use achievement compacts to establish regional collaborations and community commitment to meeting outcomes

C) Support learning organizations in creating strategies, tools, and practices to engage their communities

#### OEIB Metric (June '15)

At least 85% of stakeholders feel "adequately informed"\*  
At least 90% of stakeholders report having adequate opportunities to provide input\*

100% of regions report having business and community partners engaged in meeting Achievement Compact goals

85% of education institutions report that the created tools and processes have been useful in engaging their communities

\* Baseline not available prior to January 2013 OEIB Board meeting. Targets may change once baseline is established.

# ORBITS Budget Narrative

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## Program Descriptions

The Oregon Education Investment Board is responsible for building a seamless, more rigorous accountable P-20 system which begins with **eliminating the silos** between early learning, K-12, and post-secondary education and training and **making the connections** between:

- **Pre-school Health/Nutrition** and Kindergarten Readiness
- **Kindergarten Readiness** and Third Grade Reading Proficiency
- **Third Grade Reading Proficiency** and High School Graduation
- **High School Graduation/Degree Attainment** and **Income Mobility**

Governor Kitzhaber's recommended strategic investments—early learning and literacy; Science, Technology, Engineering, Mathematics (STEM) education; educator effectiveness; guidance and support for post-secondary aspirations— target scarce resources to the areas critical to building the P-20 system that will deliver diverse opportunities for all Oregonians to gain the skills, knowledge and understanding to make their hopes and dreams become a reality. Funding for these initiatives are within other budgets, including the Oregon Department of Education, the proposed Department of Post-Secondary Education and, the Arts Commission in the Business Development Department.

Parent engagement and focusing on the needs of English Language Learners is essential and evident throughout the recommended initiatives.

## Developing a Representative Corps of Professional Educators

Teachers bring vision, commitment and passion to supporting all children, and the state must ensure all educators have the knowledge, tools and time to improve their practice. Research is clear that the classroom teacher has the most significant impact on student learning, and no nation has improved student outcomes without a substantial investment in educators.

- To serve Oregon's changing populations, it is imperative the state's corps of professional educators represent the residents. This will require a substantial increase in the number of educators of color and culture who are prepared to help all students succeed through individualized approaches to learning.
- To promote excellence in teaching and learning, Oregon will invest in regional centers that create a statewide P-20 professional development network to build upon successful efforts to:
  - Provide mentorship and support for new teachers and leaders.

## ORBITS Budget Narrative

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- Support educators in developing and implementing meaningful, rigorous curriculum, high impact practices, and assessments that promote college and career readiness.
- Coordinate professional development and training among early learning professionals and primary grade teachers.
- Assist K-12 districts in implementing and sustaining systems for ongoing, meaningful professional growth and evaluation systems that lead to continuous improvement for all educators and leaders.
- Research best practices, identify models that get results, and helps schools and districts take appropriate practices to scale.
- Advance leadership opportunities, scholarship and other career pathways to retain and leverage the state’s most effective teachers.

### **Early Learning and Literacy**

Third grade students who are not reading at grade level are four times less likely to earn a high school diploma, and for students living in poverty, failing to meet this crucial benchmark makes them 12 times less likely to graduate. Evidence demonstrates that for students to be on a path to reading by third grade, early learning experiences that prepare them to enter school ready to learn are crucial. A reading initiative will:

- Invest in and implement strategies to engage whole communities around language and literacy in culturally appropriate ways that provide every Oregon child, regardless of native language, with the foundational skills and experiences necessary to develop a life-long love of reading.
- Expand access—through school and public libraries, community centers, childcare and healthcare settings, schools and virtually—for children, students and families to books, curriculum, resources and computers.
- Provide more learning time for students who are not proficient in reading through high-quality and engaging —*anytime, anywhere*” reading opportunities in writing, literature, science, and the arts.
- Launch a statewide reading campaign focused on ensuring that parents, educators and caregivers of young Oregonians can support the foundation for all children’s early and continued literacy skills.
- Deliver training, mentoring and support to an additional 75 districts to implement multi-tiered approaches to instruction and support for struggling readers. The Response to Intervention Network initiative has increased the number of Oregon students who are proficient in reading at 3<sup>rd</sup> grade and reduced the numbers of students referred to Special Education Services with learning disabilities.
- Leverage public and private partnerships that focus community resources and commitment on evidence-based practices to support and engage students and families.

# ORBITS Budget Narrative

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## **Connecting to the World of Work Science, Technology, Engineering, and Math (STEM)**

The 21<sup>st</sup> Century demands that Oregon's students not only have a solid foundation in literacy and math, but also the skills, knowledge, experiences and social capital necessary to connect them to the world of work. Investing in science, technology, engineering, the arts and math (STEM) is vital to engaging and motivating Oregon's students. Competencies acquired through STEM education, including computer skills, basic math, problem solving, critical thinking, and spatial awareness, are needed in a broad range of occupations and industries. In addition, —so skills” such as perseverance, collaboration, and creativity are stronger indicators of future success in college and career than even mastery of basic content.

Most important, studies suggest that current STEM degree holders from outside Oregon outnumber those from within the state by a ratio of 2:1. To attract new business and industries to Oregon, we must improve the quality of Oregon's workforce by increasing the STEM-related skills and knowledge of our graduates. Improving rates of proficiency in math and science, and improving the direct connections between Oregon's public schools and post-secondary institutions and the world of work, will increase Oregon's overall personal income and public revenue. Targeted investments could include:

Oregon has an interest in supporting the creation of models that promote flexibility, innovation and individualized learning, while supporting a more seamless transition between middle, high school and post-secondary. This investment will support 6-14 models that:

- Include a consortium of district(s), community college(s) and 4-year institutions.
- Promote more individualized, flexible, proficiency-based methods of delivering content and awarding credit for high school and post-secondary work.
- Use innovative and engaging strategies and models such as competency-based, blended learning, project or community-based work, or international studies.
- Engage underserved students and integrate academic, technical and workforce skills for young adults through hands-on, real world applications.
- Leverage research and strategies to drive new conversations and alignment between education and the economy.

## **Guidance and Support for Post-Secondary Aspirations**

The growing achievement gap between underserved students of color, living in poverty and whose first language is not English, and white students is unacceptable, particularly in the areas of high school graduation, post-secondary enrollment and completion. This crisis impacts lives, puts communities at risk, and further cripples our state's economy. Reaching the 40-40-20 Goal in a way that is representative of the state's population will require a commitment to ensuring that students are supported and guided through the P-20 education system, and that a strong culture of expectations and opportunity motivates all students to succeed.

## ORBITS Budget Narrative

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Oregon must invest in cost-effective programs that identify students, grades 6 through 10, who are at risk of dropping out or failing, and provide them systematic, individualized monitoring and mentoring. Programs that have increased outcomes for students may include:

- Summer transition for in-coming 9<sup>th</sup> graders, such as 9<sup>th</sup> Grade Counts
- “*Check & Connect*” or other cost-effective —mentor” strategy that relies on monitoring of school performance, as well as mentoring, case management, and other supports.
- Accelerated middle school programs designed to help middle school students who are behind grade level catch up with their age peers by the time they enroll in high school.
- Early intervention, gang prevention and other services for at-risk youth.
- Strong college-going culture that provides students, particularly first-generation college goers, and their families with information, access and supports.

### Environmental Factors

It is widely accepted that education in Oregon is underfunded at all levels. In the last two decades, Oregon’s per-student spending has fluctuated, but overall has dropped slightly compared to the standard inflation index. In Kindergarten through high school (K-12), today’s per pupil spending of \$8,054 seems like a significant increase over the 1990 rate of \$4,760, but when adjusted for inflation, the rate becomes slightly less than 1990, \$4,310. Inflation adjustment uses the Portland Consumer Price Index from the U.S. Bureau of Labor Statistics. Postsecondary education has seen an actual reduction in state support over the same timeframe. Oregon’s community colleges have grown over 34 percent in the last four years alone while state support for students has dropped 21 percent during the same period. For OUS, the reduction in the state’s investment is 16 percent from the 2009-2011 biennium.

The dire financial situation has forced school districts and post-secondary institutions to cut millions from their budgets in the past four years, laying off valued employees, reducing school days, and shutting down schools and programs against the wishes of the community. In K-12, the federal government has, in an attempt to improve the quality of education, burdened the state with federal mandates, paperwork and budget restrictions. Further, over the last 20 years, increases in health insurance costs and fluctuations in the state’s PERS expenses have resulted in increases in these costs that far outpace general inflation, hitting all public education institution budgets hard and shifting resources out of the classroom.

Entrenched interests, fear and suspicion, fatigue from many years of top-down reforms, and a strong tendency to blame rather than share responsibility has led to an environment in which improvement is not only difficult, it can seem impossible.

# ORBITS Budget Narrative

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## Initiatives and Accomplishments

Oregon has recently embarked upon a period of significant and comprehensive reform of its public education system. Beginning in January 2011, Governor John Kitzhaber set in motion a series of actions that have led up to the creation of the OEIB as a separate agency, tasked with steering Oregon's state education enterprise.

- In February 2011, the Governor issued an Executive Order creating the Oregon Education Investment Team, a 13 member team that began the work of examining how to create a unified, outcomes-based system of education in Oregon. The OEIT issued a full report and recommendations to the Governor in June 2011.
- In January 2011, the Governor convened an Early Learning Design Team, which met from March to July 2011 to develop recommendations for creation of a coordinated system of early learning services, and an Education Budget Design Team. The recommendations of the Early Learning and Budget Design Teams were included in the OEIT report to the Governor.
- In June 2011, the Legislature passed SB 909, which authorized the creation of a unified, student-centered system of public education from birth through K-12 and on through graduate school (PK-20) to achieve the state's educational outcomes. SB 909 authorized creation of the Oregon Education Investment Board (OEIB) and the Early Learning Council (ELC).
- In September 2011, the Governor convened the Senate Bill 909 Work Group, including the nominees to the Oregon Education Investment Board (OEIB), which met from September to November prior to confirmation.
- In November 2011, the OEIB was appointed by the Governor and confirmed by the Senate.

Once confirmed, under the Governor's leadership and with input from ELC, the OEIB:

- Issued a report to the legislature in December 2011 that developed the outcomes, progress and strategies needed to reach the 40-40-20 Goal. This report, titled Oregon Learns, forms the basis for the strategies contained herein.
- Secured passage by the 2012 Legislature of the following:
  - HB 4165: Streamlines and coordinates administration of early learning, develops process for creating accountability with community based coordinators of early learning services to encourage collaborative, outcome focused, efficient services to children and families initiates quality rating and improvement system for early learning and development



## ORBITS Budget Narrative

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programs, directs implementation of early screening tools and a kindergarten readiness assessment, and directs the ELC to create a global budgeting, or the comprehensive children's budget, approach as part of the 2013-15 budget process.

- SB 1581: Requires all school districts, Education Service Districts (ESDs), community colleges, the Oregon Health and Science University (OHSU) and the Oregon University System (OUS) and its 7 universities to enter into achievement compacts with the OEIB by July 1, 2012 and annually thereafter, representing a coordinated effort to set goals and report results focused on common outcomes and measures of progress in all stages of learning and for all groups of learners; and provides the Chief Education Officer authority to direct and control an integrated system of 0-20 education.
- Adopted rules implementing SB 1581 and achievement compact templates to be delivered to 197 school districts, 20 ESDs, 17 community colleges, OUS, 7 universities and OHSU by April 2012.
- Hired Dr. Rudolph Crew, a nationally renowned education expert and leader to be Oregon's first Chief Education Officer, effective July 1, 2012.
- Received and reviewed achievement compacts from all districts, community colleges, universities and OHSU, representing solid goals and commitments toward the 40-40-20 Goal.
- In collaboration with the Oregon Department of Education, led the effort to secure a waiver from the U.S. Department of Education to relieve Oregon from many of the constraints of the Elementary and Secondary Education Act (commonly referred to as No Child Left Behind).
- Developed OEIB's vision, guiding principles and a 3-year strategic plan that are included herein.
- Created and unanimously adopted the four strategic initiatives that are a core pieces of the Governor's recommended budget: (1) Regional Centers for Excellence in Teaching & Learning; (2) Early Reading Initiative; (3) Guidance & Support for Post-Secondary Aspirations; and (4) Connecting to the World of Work.
- Adopted and disseminated the Achievement Compact template to all school districts, ESD's and community colleges for 2013.

# ORBITS Budget Narrative

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## Criteria for 2013-2015 Budget Development

The OEIB's budget was developed with the following criteria in mind: (1) efficiency and flexibility; (2) ability to implement the OEIB key strategies:

- Create a coordinated, student-centered education system, from birth through college and career readiness (0-20), to enable all Oregon students to learn at their best pace and achieve their full potential. At the state level, this will require integration of Oregon's capacities, articulation across PK-20, relief from mandates, and more strategic use of resources to encourage and support successful teaching and learning across the education continuum.
- Focus state investment on achieving student outcomes: The state must define the core student and community outcomes that matter in education, start early in ensuring young children are ready for school, support districts education institutions in setting goals around those core outcomes and take mutual responsibility for achieving the goals. The state must drive state and local investment strategies toward achieving these outcomes for students, being much more intentional about investing in the programs, services, tools, leverage points and the community strategies that will make the biggest difference for effective teaching and learning and student success.
- Build statewide support systems: The state's role is not to deliver education, but rather to invest in and support the thousands of institutions and providers across the state that do. To succeed, Oregon must engage educators and leaders, students and families, communities, and employers to achieve the educational excellence envisioned for Oregonian students. The state will continue to set standards, provide guidance, and conduct assessments, coordinated along the education pathway. Nevertheless, the state must also focus on researching what works, providing a structure to support continuous improvement, improving educator effectiveness, and increasing support for educational entities and their educators.

The three strategies are overlapping, driven by student learning outcomes, and aimed at transforming the state's approach to education. Implementation will replace Oregon's current segmented system focused on institutions to a series of key leverage points along individual pathways that lead all students to successful learning experiences, productive careers and lifelong contributions to the community. The strategies represent, for the student, a promise of educational excellence at all levels; for the educator, an invitation to lead and improve student achievement; for the taxpayer, a return on investment; and to parents, community leaders, employers, policymakers, and educational organizations, a new partnership for educational achievement in Oregon.

# ORBITS Budget Narrative

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## Major Information Technology Projects / Initiatives

SB 909 directed the OEIB to provide an integrated, statewide, student-based data system that monitors expenditures and outcomes to determine the return on statewide education investments. The OEIB has defined the purposes of this database as (1) ensuring that longitudinal student information and outcome data is available at the provider and policy-maker level and (2) supporting teaching and learning, providing information to students and parents, and supporting the identification and dissemination of best practices across outcomes.

Existing federal investments (ALDER grant) are supporting the Oregon Department of Education, with support from all other education agencies, in tackling the many governance, privacy, logistical and practical issues that come with collecting, coordinating and linking data across institutions. In addition, the Early Learning Council is charged with developing an integrated data system that brings together data from early learning, health, and human services at the level of the child, provider, and community to streamline services, guide resource allocation, and provide accountability for early childhood investments, and is using the ALDER grant resources to begin this work.

The Oregon Department of Education budget includes \$200,000 for the development of a comprehensive report that sets a clear direction for the next steps in developing and operationalizing the system in a way that is efficient, useful and sustainable. This business case would be manifest in the form of four interlaced strategies addressing:

1. What functionality is essential for the system (and what can be phased in over time)
2. What is the best technical approach to realize such functionality
3. How will we ensure support and collaboration of disparate parties, organizations and systems involved
4. What is a sustainable business model for financing such an undertaking.

OEIB will present the business case to the 2014 Legislature with a request to utilize ODE's \$10 million in bonding capacity for the development of the longitudinal data system.

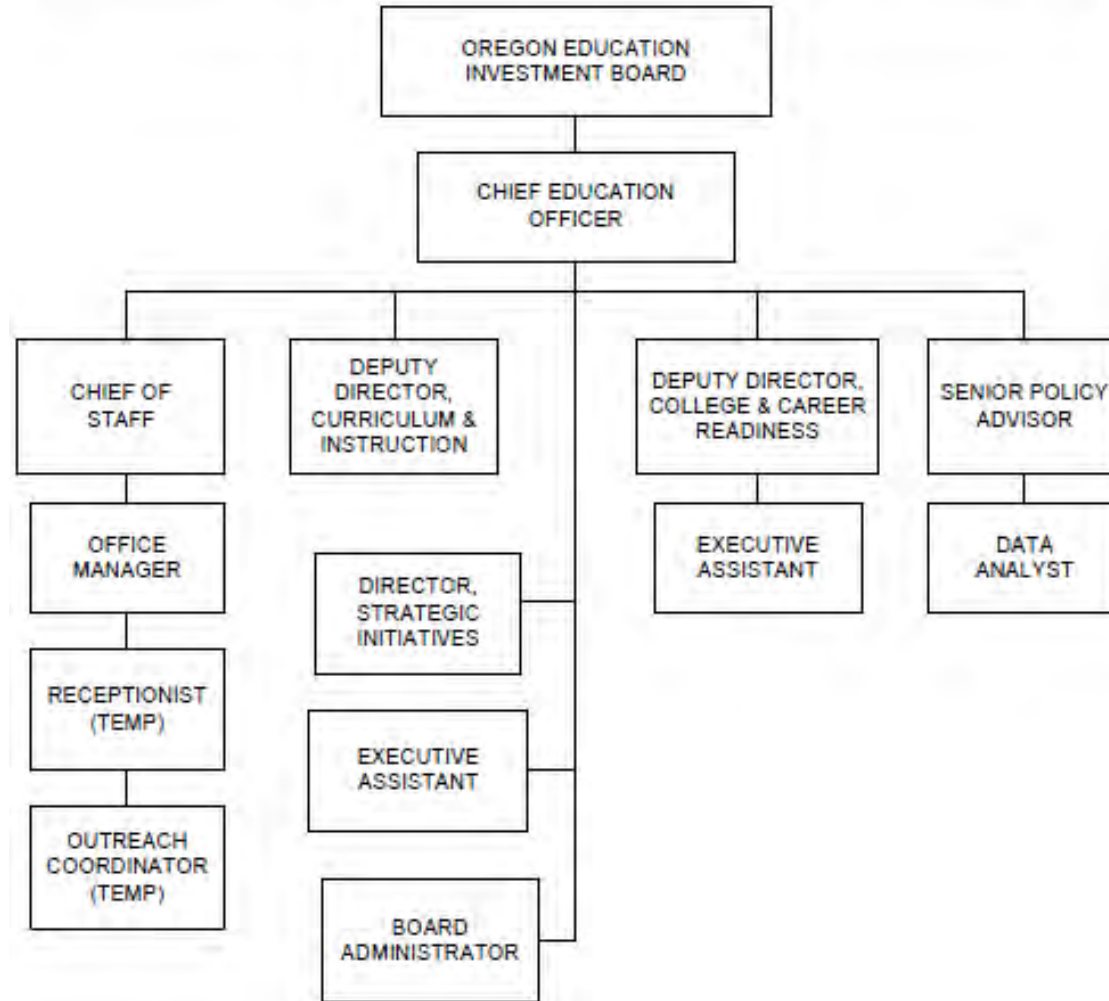
## ORBITS Budget Narrative

### Reduction Options

ACTIVITY OR PROGRAM (WHICH PROGRAM OR ACTIVITY WILL NOT BE UNDERTAKEN)	DESCRIBE REDUCTION (DESCRIBE THE EFFECTS OF THIS REDUCTION. INCLUDE POSITIONS AND FTE IN 2013-15 AND 2015-17)	AMOUNT AND FUND TYPE (GF, LF, OF, FF. IDENTIFY REVENUE SOURCE FOR OF, FF)	RANK AND JUSTIFICATION (RANK THE ACTIVITIES OR PROGRAMS NOT UNDERTAKEN IN ORDER OF LOWEST COST FOR BENEFIT OBTAINED)
AGENCYWIDE	\$304,085 - PROFESSIONAL SERVICES	\$304,085 - GENERAL FUND	OUTSIDE ORGANIZATIONS AND CONSULTANTS ARE UNIQUELY ORGANIZED AND SPECIFICALLY TRAINED TO COMPLETE TARGETED COMPONENTS ESSENTIAL TO OEIB'S WORK AND PERMIT THE AGGRESSIVE TIMELINES OEIB HAS BUILT INTO ITS STRATEGIC PLAN.

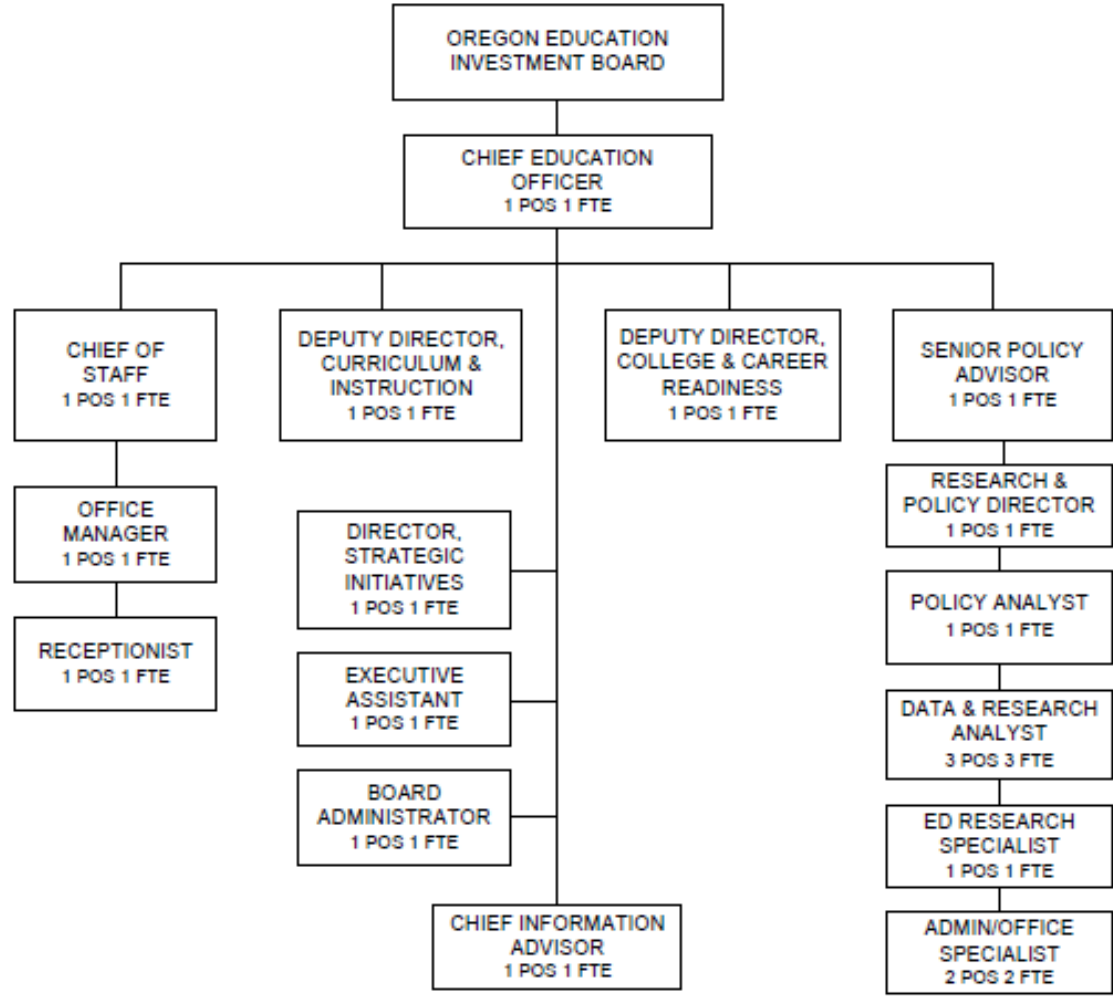
# ORBITS Budget Narrative

**OREGON EDUCATION INVESTMENT BOARD  
ORGANIZATION CHART  
2011-13 BIENNIUM – GOVERNOR’S BALANCED BUDGET**



# ORBITS Budget Narrative

**OREGON EDUCATION INVESTMENT BOARD  
ORGANIZATION CHART  
2013-15 BIENNIUM – GOVERNOR’S BALANCED BUDGET  
19 POS 19.0 FTE**



**Summary of 2013-15 Biennium Budget**

Oregon Education Investment Board  
 Oregon Education Investment Board  
 2013-15 Biennium

Governor's Budget  
 Cross Reference Number: 52400-000-00-00-00000

<i>Description</i>	<i>Positions</i>	<i>Full-Time Equivalent (FTE)</i>	<i>ALL FUNDS</i>	<i>General Fund</i>	<i>Lottery Funds</i>	<i>Other Funds</i>	<i>Federal Funds</i>	<i>Nonlimited Other Funds</i>	<i>Nonlimited Federal Funds</i>
2011-13 Leg Adopted Budget	-	-	-	-	-	-	-	-	-
2011-13 Emergency Boards	-	-	-	-	-	-	-	-	-
<b>2011-13 Leg Approved Budget</b>	-	-	-	-	-	-	-	-	-
<b>2013-15 Base Budget Adjustments</b>									
Net Cost of Position Actions									
Administrative Biennialized E-Board, Phase-Out	-	-	-	-	-	-	-	-	-
Estimated Cost of Merit Increase			-	-	-	-	-	-	-
Base Debt Service Adjustment			-	-	-	-	-	-	-
Base Nonlimited Adjustment			-	-	-	-	-	-	-
Capital Construction			-	-	-	-	-	-	-
<b>Subtotal 2013-15 Base Budget</b>	-	-	-	-	-	-	-	-	-
<b>Subtotal: 2013-15 Current Service Level</b>	-	-	-	-	-	-	-	-	-

**Summary of 2013-15 Biennium Budget**

Oregon Education Investment Board  
 Oregon Education Investment Board  
 2013-15 Biennium

Governor's Budget  
 Cross Reference Number: 52400-000-00-00-00000

<i>Description</i>	<i>Positions</i>	<i>Full-Time Equivalent (FTE)</i>	<i>ALL FUNDS</i>	<i>General Fund</i>	<i>Lottery Funds</i>	<i>Other Funds</i>	<i>Federal Funds</i>	<i>Nonlimited Other Funds</i>	<i>Nonlimited Federal Funds</i>
<b>Subtotal: 2013-15 Current Service Level</b>	-	-	-	-	-	-	-	-	-
<b>Modified 2013-15 Current Service Level</b>	-	-	-	-	-	-	-	-	-
Policy Packages									
091 - Statewide Administrative Savings	-	-	-	-	-	-	-	-	-
092 - PERS Taxation Policy	-	-	(13,108)	(13,108)	-	-	-	-	-
093 - Other PERS Adjustments	-	-	(104,737)	(104,737)	-	-	-	-	-
503 - Transfer to Oregon Edu Investment Bd	-	-	-	-	-	-	-	-	-
101 - OEIB Board and Staff	11	11.00	4,721,042	4,721,042	-	-	-	-	-
102 - Educational Research Capacity	8	8.00	1,395,635	1,395,635	-	-	-	-	-
103 - PK-20 Program Initiatives	-	-	1,250,000	1,250,000	-	-	-	-	-
<b>Subtotal Policy Packages</b>	<b>19</b>	<b>19.00</b>	<b>7,248,832</b>	<b>7,248,832</b>	-	-	-	-	-
<b>Total 2013-15 Governor's Budget</b>	<b>19</b>	<b>19.00</b>	<b>7,248,832</b>	<b>7,248,832</b>	-	-	-	-	-
Percentage Change From 2011-13 Leg Approved Budget	-	-	-	-	-	-	-	-	-
Percentage Change From 2013-15 Current Service Level	-	-	-	-	-	-	-	-	-



**Summary of 2013-15 Biennium Budget**

Oregon Education Investment Board  
 Oregon Education Investment Board  
 2013-15 Biennium

Governor's Budget  
 Cross Reference Number: 52400-001-00-00-00000

<i>Description</i>	<i>Positions</i>	<i>Full-Time Equivalent (FTE)</i>	<i>ALL FUNDS</i>	<i>General Fund</i>	<i>Lottery Funds</i>	<i>Other Funds</i>	<i>Federal Funds</i>	<i>Nonlimited Other Funds</i>	<i>Nonlimited Federal Funds</i>
2011-13 Leg Adopted Budget	-	-	-	-	-	-	-	-	-
2011-13 Emergency Boards	-	-	-	-	-	-	-	-	-
<b>2011-13 Leg Approved Budget</b>	-	-	-	-	-	-	-	-	-
<b>2013-15 Base Budget Adjustments</b>									
Net Cost of Position Actions									
Administrative Biennialized E-Board, Phase-Out	-	-	-	-	-	-	-	-	-
Estimated Cost of Merit Increase			-	-	-	-	-	-	-
Base Debt Service Adjustment			-	-	-	-	-	-	-
Base Nonlimited Adjustment			-	-	-	-	-	-	-
Capital Construction			-	-	-	-	-	-	-
<b>Subtotal 2013-15 Base Budget</b>	-	-	-	-	-	-	-	-	-
<b>Subtotal: 2013-15 Current Service Level</b>	-	-	-	-	-	-	-	-	-

**Summary of 2013-15 Biennium Budget**

Oregon Education Investment Board  
 Oregon Education Investment Board  
 2013-15 Biennium

Governor's Budget  
 Cross Reference Number: 52400-001-00-00-00000

<i>Description</i>	<i>Positions</i>	<i>Full-Time Equivalent (FTE)</i>	<i>ALL FUNDS</i>	<i>General Fund</i>	<i>Lottery Funds</i>	<i>Other Funds</i>	<i>Federal Funds</i>	<i>Nonlimited Other Funds</i>	<i>Nonlimited Federal Funds</i>
<b>Subtotal: 2013-15 Current Service Level</b>	-	-	-	-	-	-	-	-	-
<b>Modified 2013-15 Current Service Level</b>	-	-	-	-	-	-	-	-	-
Policy Packages									
091 - Statewide Administrative Savings	-	-	-	-	-	-	-	-	-
092 - PERS Taxation Policy	-	-	(13,108)	(13,108)	-	-	-	-	-
093 - Other PERS Adjustments	-	-	(104,737)	(104,737)	-	-	-	-	-
503 - Transfer to Oregon Edu Investment Bd	-	-	-	-	-	-	-	-	-
101 - OEIB Board and Staff	11	11.00	4,721,042	4,721,042	-	-	-	-	-
102 - Educational Research Capacity	8	8.00	1,395,635	1,395,635	-	-	-	-	-
103 - PK-20 Program Initiatives	-	-	1,250,000	1,250,000	-	-	-	-	-
<b>Subtotal Policy Packages</b>	<b>19</b>	<b>19.00</b>	<b>7,248,832</b>	<b>7,248,832</b>	-	-	-	-	-
<b>Total 2013-15 Governor's Budget</b>	<b>19</b>	<b>19.00</b>	<b>7,248,832</b>	<b>7,248,832</b>	-	-	-	-	-
Percentage Change From 2011-13 Leg Approved Budget	-	-	-	-	-	-	-	-	-
Percentage Change From 2013-15 Current Service Level	-	-	-	-	-	-	-	-	-

Description	2009-11 Actuals	2011-13 Leg Adopted Budget	2011-13 Leg Approved Budget	2013-15 Agency Request Budget	2013-15 Governor's Budget	2013-15 Leg Adopted Budget
<b>LIMITED BUDGET (Policy Packages)</b>						
092-PERS TAXATION POLICY- RANK 0 - 001-00-00-00000						
General Fund	-	-	-	-	(13,108)	-
093-OTHER PERS ADJUSTMENTS- RANK 0 - 001-00-00-00000						
General Fund	-	-	-	-	(104,737)	-
101-OEIB BOARD AND STAFF- RANK 0 - 001-00-00-00000						
General Fund	-	-	-	-	4,721,042	-
Authorized Positions	-	-	-	-	11	-
Authorized FTE	-	-	-	-	11.00	-
102-EDUCATIONAL RESEARCH CAPACITY- RANK 0 - 001-00-00-00000						
General Fund	-	-	-	-	1,395,635	-
Authorized Positions	-	-	-	-	8	-
Authorized FTE	-	-	-	-	8.00	-
103-PK-20 PROGRAM INITIATIVES- RANK 0 - 001-00-00-00000						
General Fund	-	-	-	-	1,250,000	-
<b>TOTAL LIMITED BUDGET (Policy Packages)</b>						
General Fund	-	-	-	-	7,248,832	-
AUTHORIZED POSITIONS	-	-	-	-	19	-
AUTHORIZED FTE	-	-	-	-	19.00	-
<b>TOTAL LIMITED BUDGET (Including Packages)</b>						
General Fund	-	-	-	-	7,248,832	-
AUTHORIZED POSITIONS	-	-	-	-	19	-
AUTHORIZED FTE	-	-	-	-	19.00	-
<b>OPERATING BUDGET (Policy Packages)</b>						

Description	2009-11 Actuals	2011-13 Leg Adopted Budget	2011-13 Leg Approved Budget	2013-15 Agency Request Budget	2013-15 Governor's Budget	2013-15 Leg Adopted Budget
092-PERS TAXATION POLICY- RANK 0 - 001-00-00-00000						
General Fund	-	-	-	-	(13,108)	-
093-OTHER PERS ADJUSTMENTS- RANK 0 - 001-00-00-00000						
General Fund	-	-	-	-	(104,737)	-
101-OEIB BOARD AND STAFF- RANK 0 - 001-00-00-00000						
General Fund	-	-	-	-	4,721,042	-
Authorized Positions	-	-	-	-	11	-
Authorized FTE	-	-	-	-	11.00	-
102-EDUCATIONAL RESEARCH CAPACITY- RANK 0 - 001-00-00-00000						
General Fund	-	-	-	-	1,395,635	-
Authorized Positions	-	-	-	-	8	-
Authorized FTE	-	-	-	-	8.00	-
103-PK-20 PROGRAM INITIATIVES- RANK 0 - 001-00-00-00000						
General Fund	-	-	-	-	1,250,000	-
<b>TOTAL OPERATING BUDGET (Policy Packages)</b>						
General Fund	-	-	-	-	7,248,832	-
AUTHORIZED POSITIONS	-	-	-	-	19	-
AUTHORIZED FTE	-	-	-	-	19.00	-
<b>TOTAL OPERATING BUDGET (Including Packages)</b>						
General Fund	-	-	-	-	7,248,832	-
AUTHORIZED POSITIONS	-	-	-	-	19	-
AUTHORIZED FTE	-	-	-	-	19.00	-
<b>TOTAL BUDGET (Policy Packages)</b>						
092-PERS TAXATION POLICY- RANK 0 - 001-00-00-00000						

Description	2009-11 Actuals	2011-13 Leg Adopted Budget	2011-13 Leg Approved Budget	2013-15 Agency Request Budget	2013-15 Governor's Budget	2013-15 Leg Adopted Budget
General Fund	-	-	-	-	(13,108)	-
093-OTHER PERS ADJUSTMENTS- RANK 0 - 001-00-00-00000						
General Fund	-	-	-	-	(104,737)	-
101-OEIB BOARD AND STAFF- RANK 0 - 001-00-00-00000						
General Fund	-	-	-	-	4,721,042	-
Authorized Positions	-	-	-	-	11	-
Authorized FTE	-	-	-	-	11.00	-
102-EDUCATIONAL RESEARCH CAPACITY- RANK 0 - 001-00-00-00000						
General Fund	-	-	-	-	1,395,635	-
Authorized Positions	-	-	-	-	8	-
Authorized FTE	-	-	-	-	8.00	-
103-PK-20 PROGRAM INITIATIVES- RANK 0 - 001-00-00-00000						
General Fund	-	-	-	-	1,250,000	-
<b>TOTAL BUDGET (Policy Packages)</b>						
General Fund	-	-	-	-	7,248,832	-
AUTHORIZED POSITIONS	-	-	-	-	19	-
AUTHORIZED FTE	-	-	-	-	19.00	-
<b>TOTAL BUDGET (Including Packages)</b>						
General Fund	-	-	-	-	7,248,832	-
AUTHORIZED POSITIONS	-	-	-	-	19	-
AUTHORIZED FTE	-	-	-	-	19.00	-

**Oregon Education Investment Board**

**Agency Number: 52400**

Agencywide Program Unit Summary  
2013-15 Biennium

Version: Y - 01 - Governor's Budget

<b>Summary Cross Reference Number</b>	<b>Cross Reference Description</b>	<b>2009-11 Actuals</b>	<b>2011-13 Leg Adopted Budget</b>	<b>2011-13 Leg Approved Budget</b>	<b>2013-15 Agency Request Budget</b>	<b>2013-15 Governor's Budget</b>	<b>2013-15 Leg Adopted Budget</b>
001-00-00-00000	<b>Oregon Education Investment Board</b>						
	General Fund	-	-	-	-	7,248,832	-
<b>TOTAL AGENCY</b>							
	General Fund	-	-	-	-	7,248,832	-

Agencywide Revenues and Disbursements Summary  
2013-15 Biennium

Version: Y-01-Governor's Budget

<i>Description</i>	<i>2009-11 Actuals</i>	<i>2011-13 Leg Adopted Budget</i>	<i>2011-13 Leg Approved Budget</i>	<i>2013-15 Agency Request Budget</i>	<i>2013-15 Governor's Budget</i>	<i>2013-15 Leg Adopted Budget</i>
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**REVENUE CATEGORIES**

**GENERAL FUND APPROPRIATION**

**0050 General Fund Appropriation**

General Fund	-	-	-	-	7,248,832	-
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**AVAILABLE REVENUES**

General Fund	-	-	-	-	7,248,832	-
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**EXPENDITURES**

General Fund	-	-	-	-	7,248,832	-
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# ORBITS Budget Narrative

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## Essential and Policy Package Narrative

### Policy Package 092 – PERS Taxation Policy

#### Package Description

This package supports a policy change to limit tax relief calculations to PERS retirees that are Oregon residence.

### Policy Package 093 – Other PERS Adjustments

#### Package Description

This package supports policy changes that reduce the PERS employer rate

### Policy Package 101 – OEIB Board and Staff

#### Package Description

This package funds the operations of OEIB and staff. The Chief Education Officer (CEdO) is the executive officer of OEIB and leads staff in creating and overseeing a unified public education system. In SB 1581 (2012), the Legislature expanded the authority of the CEdO to include direction and control over the top education officials in state government and the university system for the purpose of designing and organizing the state's P-20 education system. The Deputy Director of Curriculum and Instruction (C&I) leads the P-20 alignment of standards and assessments, as well as provides leadership and support to ODE C&I. The Deputy Director of College and Career Readiness leads the design of the plan to recruit, develop, and support educators, as well as connect post-secondary and K-12 education. The Sr. Policy Advisor leads the design of the P-20 structure and accountability systems and will manage the research and policy unit. The Director of Strategic Initiatives leads the development and design of new initiatives and codifies best practices and learnings. The Chief Information Advisor will lead the longitudinal data system design. The Chief of Staff directs and coordinates activities associated with the office, as well as leads communication efforts. The administrative staff provides complex, high-level and confidential support in the areas of management and policies of the Oregon education system.

### Policy Package 102 – Educational Research Capacity

#### Package Description

Efforts to improve education across the country have increasingly identified the use of data as a key element of the strategy. Data analysis is at the core of the Governor and OEIB's strategy of continuous improvement, ensuring budgets are strategically aimed at promoting outcomes, and supporting educational institutions, students, families and policymakers with valid and reliable information about what works. For that reason, the Governor recommends creation of the OEIB Policy & Research Unit.



## ORBITS Budget Narrative

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The OEIB Policy & Research Unit will ensure that data is not only collected, but also analyzed and operationalized, in order to support educators, care providers, and policy makers in responding to the needs of Oregon's students. For example, currently, the state's capacity allows only for the reporting out of high school graduation rates or improvement goals set by Oregon's school district through the Achievement Compacts. The OEIB Policy & Research Unit would go much deeper, for example: (1) gathering information on the process and methodologies used by districts to set achievement compact goals; (2) analyzing the return on investment, variance in conditions, and educational best practices in place in various school districts; (3) examining policy and financial barriers to implementing best practices broadly; and (4) drafting model policies and working closely with the Legislature to analyze policies. In addition, the Policy & Research Unit would serve as a Research & Development lab – promoting innovation in education across the state while ensuring that investments in innovation are tracked, tested, and improved in order to achieve the greatest return on investment for the state's limited dollars.

The OEIB Policy & Research Unit will do the following:

- (1) Ensure OEIB has direct access to student-level data from ODE, DPSE, and the university system;
- (2) Develop a consortium of research partners, including Oregon's private universities, other agencies, and prominent education and economic research entities operating in Oregon;
- (3) Provide data analysis, research, presentations, white papers and other publications aimed at identifying and disseminating best practices and promising innovations;
- (4) Refine and operationalize a dashboard of high-level metrics for OEIB;
- (5) Analyze state and district investments and determine return on investment;
- (6) Provide policy reviews and recommendations to support the goals of the OEIB;
- (7) Respond to requests from the Legislature for education research and policy analysis;
- (8) Prioritize and respond to requests for research and analysis from outside entities;
- (9) Assist ODE in adequately staffing the Quality Education Commission.

### **Policy Package 103 – PK-20 Program Initiatives**

**Statewide Early Literacy** – the Governor and CEdO have proposed an \$8.2 million early literacy initiative aimed at improving the number of students who arrive at Kindergarten ready to learn and that are reading at level by the end of Grade 3. While the bulk of this initiative is in ODE's budget, the OEIB requests \$250,000 to:

- (1) Develop a website of literacy resources, games & volunteer opportunities; educational materials; and resources packages and training materials for parents, educators and caregivers;

## ORBITS Budget Narrative

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- (2) Create modes for distributing those resources statewide, including involving the Governor, Chief Education Officer, and other agency and local government leaders;
- (3) Solicit commitment and connect businesses, nonprofits and communities in support of early literacy.

**Regional Achievement Compact Pilot** – OEIB requests \$1 million to pilot regional achievement compact consortiums aimed at bringing together educational institutions across the P-20 continuum, as well as social service and health providers, to share ideas, pool resources and incent shared accountability and commitment to reaching the 40-40-20 Goal. The purposes of OEIB's regional achievement compact pilot are to:

- (1) Engage Oregon's P-20 institutions in ongoing problem solving dialogue leading to a culture of statewide, continuous improvement.
- (2) Focus, align and measure the value of state resources against models designed specifically to increase student growth while decreasing historical gaps in student outcomes.
- (3) Transition away from institutional silos, isolation of best practice such that parents, students, teachers and leaders share knowledge, collaborate and build a statewide culture of collaboration over competition.

The majority, \$750,000, of this initiative will pass through as grants-in-aid to consortiums that have demonstrated readiness to participate, and met criteria established by the CEdO. In 2013, 6-10 consortiums will be selected from geographically and demographically diverse regions of the state. Each institution will complete a compact that presents two components of performance. The regions will commit to a collaborative process by which institutions in a given region analyze data with an eye towards ways in which the larger region can work together in a community effort to address challenges that exist beyond the classroom and help change the culture of its schools and colleges.

Institutions participating in the pilot will attend the annual state connections conference where districts and colleges will gather alongside social services and health providers, civic and cultural groups, parent advocates, non-profits, businesses, foundations and other community services that can commit to partnering with the institutions to meet the needs of children, students and graduates.

The remaining \$250,000 will be used by the OEIB to support facilitation of the regional collaborations, and planning of two state connections conferences, held in late summer of 2013 and summer of 2014.

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Oregon Education Investment Board  
 Pkg: 092 - PERS Taxation Policy

Cross Reference Name: Oregon Education Investment Board  
 Cross Reference Number: 52400-001-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Revenues</b>							
General Fund Appropriation	(13,108)	-	-	-	-	-	(13,108)
<b>Total Revenues</b>	<b>(\$13,108)</b>	-	-	-	-	-	<b>(\$13,108)</b>
<b>Personal Services</b>							
PERS Policy Adjustment	(13,108)	-	-	-	-	-	(13,108)
<b>Total Personal Services</b>	<b>(\$13,108)</b>	-	-	-	-	-	<b>(\$13,108)</b>
<b>Total Expenditures</b>							
Total Expenditures	(13,108)	-	-	-	-	-	(13,108)
<b>Total Expenditures</b>	<b>(\$13,108)</b>	-	-	-	-	-	<b>(\$13,108)</b>
<b>Ending Balance</b>							
Ending Balance	-	-	-	-	-	-	-
<b>Total Ending Balance</b>	-	-	-	-	-	-	-

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Oregon Education Investment Board  
Pkg: 093 - Other PERS Adjustments

Cross Reference Name: Oregon Education Investment Board  
Cross Reference Number: 52400-001-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Revenues</b>							
General Fund Appropriation	(104,737)	-	-	-	-	-	(104,737)
<b>Total Revenues</b>	<b>(\$104,737)</b>	-	-	-	-	-	<b>(\$104,737)</b>
<b>Personal Services</b>							
PERS Policy Adjustment	(104,737)	-	-	-	-	-	(104,737)
<b>Total Personal Services</b>	<b>(\$104,737)</b>	-	-	-	-	-	<b>(\$104,737)</b>
<b>Total Expenditures</b>							
Total Expenditures	(104,737)	-	-	-	-	-	(104,737)
<b>Total Expenditures</b>	<b>(\$104,737)</b>	-	-	-	-	-	<b>(\$104,737)</b>
<b>Ending Balance</b>							
Ending Balance	-	-	-	-	-	-	-
<b>Total Ending Balance</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

**Oregon Education Investment Board**  
**Pkg: 101 - OEIB Board and Staff**

**Cross Reference Name: Oregon Education Investment Board**  
**Cross Reference Number: 52400-001-00-00-00000**

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Revenues</b>							
General Fund Appropriation	4,721,042	-	-	-	-	-	4,721,042
<b>Total Revenues</b>	<b>\$4,721,042</b>	-	-	-	-	-	<b>\$4,721,042</b>
<b>Personal Services</b>							
Class/Unclass Sal. and Per Diem	2,222,832	-	-	-	-	-	2,222,832
All Other Differential	287,904	-	-	-	-	-	287,904
Empl. Rel. Bd. Assessments	440	-	-	-	-	-	440
Public Employees' Retire Cont	478,248	-	-	-	-	-	478,248
Social Security Taxes	176,642	-	-	-	-	-	176,642
Worker's Comp. Assess. (WCD)	649	-	-	-	-	-	649
Mass Transit Tax	15,066	-	-	-	-	-	15,066
Flexible Benefits	335,808	-	-	-	-	-	335,808
Reconciliation Adjustment	337	-	-	-	-	-	337
<b>Total Personal Services</b>	<b>\$3,517,926</b>	-	-	-	-	-	<b>\$3,517,926</b>
<b>Services &amp; Supplies</b>							
Instate Travel	69,805	-	-	-	-	-	69,805
Employee Training	19,586	-	-	-	-	-	19,586
Office Expenses	22,286	-	-	-	-	-	22,286
Telecommunications	27,011	-	-	-	-	-	27,011
State Gov. Service Charges	285,000	-	-	-	-	-	285,000
Publicity and Publications	3,042	-	-	-	-	-	3,042
Professional Services	724,000	-	-	-	-	-	724,000
Dues and Subscriptions	3,086	-	-	-	-	-	3,086

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Oregon Education Investment Board  
Pkg: 101 - OEIB Board and Staff

Cross Reference Name: Oregon Education Investment Board  
Cross Reference Number: 52400-001-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Services &amp; Supplies</b>							
Facilities Rental and Taxes	37,136	-	-	-	-	-	37,136
Other Services and Supplies	7,425	-	-	-	-	-	7,425
Expendable Prop 250 - 5000	4,739	-	-	-	-	-	4,739
<b>Total Services &amp; Supplies</b>	<b>\$1,203,116</b>	-	-	-	-	-	<b>\$1,203,116</b>
<b>Total Expenditures</b>							
Total Expenditures	4,721,042	-	-	-	-	-	4,721,042
<b>Total Expenditures</b>	<b>\$4,721,042</b>	-	-	-	-	-	<b>\$4,721,042</b>
<b>Ending Balance</b>							
Ending Balance	-	-	-	-	-	-	-
<b>Total Ending Balance</b>	-	-	-	-	-	-	-
<b>Total Positions</b>							
Total Positions							11
<b>Total Positions</b>	-	-	-	-	-	-	<b>11</b>
<b>Total FTE</b>							
Total FTE							11.00
<b>Total FTE</b>	-	-	-	-	-	-	<b>11.00</b>

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

**Oregon Education Investment Board**  
**Pkg: 102 - Educational Research Capacity**

**Cross Reference Name: Oregon Education Investment Board**  
**Cross Reference Number: 52400-001-00-00-00000**

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Revenues</b>							
General Fund Appropriation	1,395,635	-	-	-	-	-	1,395,635
<b>Total Revenues</b>	<b>\$1,395,635</b>	-	-	-	-	-	<b>\$1,395,635</b>
<b>Personal Services</b>							
Class/Unclass Sal. and Per Diem	736,992	-	-	-	-	-	736,992
Empl. Rel. Bd. Assessments	320	-	-	-	-	-	320
Public Employees' Retire Cont	140,547	-	-	-	-	-	140,547
Social Security Taxes	56,379	-	-	-	-	-	56,379
Worker's Comp. Assess. (WCD)	472	-	-	-	-	-	472
Mass Transit Tax	4,422	-	-	-	-	-	4,422
Flexible Benefits	244,224	-	-	-	-	-	244,224
Reconciliation Adjustment	25,139	-	-	-	-	-	25,139
<b>Total Personal Services</b>	<b>\$1,208,495</b>	-	-	-	-	-	<b>\$1,208,495</b>
<b>Services &amp; Supplies</b>							
Instate Travel	5,805	-	-	-	-	-	5,805
Employee Training	22,283	-	-	-	-	-	22,283
Office Expenses	20,258	-	-	-	-	-	20,258
Telecommunications	20,933	-	-	-	-	-	20,933
Publicity and Publications	4,557	-	-	-	-	-	4,557
Employee Recruitment and Develop	7,594	-	-	-	-	-	7,594
Dues and Subscriptions	4,436	-	-	-	-	-	4,436
Facilities Rental and Taxes	27,008	-	-	-	-	-	27,008
Other Services and Supplies	5,502	-	-	-	-	-	5,502

\_\_\_\_ Agency Request  
 2013-15 Biennium

\_\_\_\_ Governor's Budget  
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\_\_\_\_ Legislatively Adopted  
 Essential and Policy Package Fiscal Impact Summary - BPR013

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Oregon Education Investment Board  
 Pkg: 102 - Educational Research Capacity

Cross Reference Name: Oregon Education Investment Board  
 Cross Reference Number: 52400-001-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Services &amp; Supplies</b>							
Expendable Prop 250 - 5000	32,958	-	-	-	-	-	32,958
IT Expendable Property	35,806	-	-	-	-	-	35,806
<b>Total Services &amp; Supplies</b>	<b>\$187,140</b>	-	-	-	-	-	<b>\$187,140</b>
<b>Total Expenditures</b>							
Total Expenditures	1,395,635	-	-	-	-	-	1,395,635
<b>Total Expenditures</b>	<b>\$1,395,635</b>	-	-	-	-	-	<b>\$1,395,635</b>
<b>Ending Balance</b>							
Ending Balance	-	-	-	-	-	-	-
<b>Total Ending Balance</b>	-	-	-	-	-	-	-
<b>Total Positions</b>							
Total Positions							8
<b>Total Positions</b>	-	-	-	-	-	-	<b>8</b>
<b>Total FTE</b>							
Total FTE							8.00
<b>Total FTE</b>	-	-	-	-	-	-	<b>8.00</b>



**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Oregon Education Investment Board  
 Pkg: 103 - PK-20 Program Initiatives

Cross Reference Name: Oregon Education Investment Board  
 Cross Reference Number: 52400-001-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Revenues</b>							
General Fund Appropriation	1,250,000	-	-	-	-	-	1,250,000
<b>Total Revenues</b>	<b>\$1,250,000</b>	-	-	-	-	-	<b>\$1,250,000</b>
<b>Services &amp; Supplies</b>							
Instate Travel	50,000	-	-	-	-	-	50,000
Publicity and Publications	50,000	-	-	-	-	-	50,000
Professional Services	1,150,000	-	-	-	-	-	1,150,000
<b>Total Services &amp; Supplies</b>	<b>\$1,250,000</b>	-	-	-	-	-	<b>\$1,250,000</b>
<b>Total Expenditures</b>							
Total Expenditures	1,250,000	-	-	-	-	-	1,250,000
<b>Total Expenditures</b>	<b>\$1,250,000</b>	-	-	-	-	-	<b>\$1,250,000</b>
<b>Ending Balance</b>							
Ending Balance	-	-	-	-	-	-	-
<b>Total Ending Balance</b>	-	-	-	-	-	-	-

REPORT: PACKAGE FISCAL IMPACT REPORT

2013-15

PROD FILE

AGENCY:52400 OREGON EDUCATION INVESTMENT BD

PICS SYSTEM: BUDGET PREPARATION

SUMMARY XREF:001-00-00 Oregon Education Investment Bo

PACKAGE: 101 - OEIB Board and Staff

POSITION NUMBER	CLASS	COMP	CLASS NAME	POS CNT	FTE	MOS	STEP	RATE	GF SAL/OPE	OF SAL/OPE	FF SAL/OPE	LF SAL/OPE	AF SAL/OPE
5240001	MESNZ7016	AA	PRINCIPAL EXECUTIVE/MANAGER I	1	1.00	24.00	09	12,096.00	290,304 103,690				290,304 103,690
5240002	MESNZ7014	EA	PRINCIPAL EXECUTIVE/MANAGER H	1	1.00	24.00	09	11,527.00	276,648 101,086				276,648 101,086
5240003	MESNZ7012	EA	PRINCIPAL EXECUTIVE/MANAGER G	1	1.00	24.00	09	10,454.00	250,896 96,175				250,896 96,175
5240004	MESNZ7012	EA	PRINCIPAL EXECUTIVE/MANAGER G	1	1.00	24.00	09	10,454.00	250,896 96,175				250,896 96,175
5240005	MESNZ7012	EA	PRINCIPAL EXECUTIVE/MANAGER G	1	1.00	24.00	09	10,454.00	250,896 96,175				250,896 96,175
5240006	MENNZ0830	AA	EXECUTIVE ASSISTANT	1	1.00	24.00	04	4,364.00	104,736 58,612				104,736 58,612
5240007	MENNZ0830	AA	EXECUTIVE ASSISTANT	1	1.00	24.00	08	5,304.00	127,296 64,640				127,296 64,640
5240008	MENNZ0119	AA	EXECUTIVE SUPPORT SPECIALIST 2	1	1.00	24.00	08	3,970.00	95,280 56,086				95,280 56,086
5240009	MESNZ7012	EA	PRINCIPAL EXECUTIVE/MANAGER G	1	1.00	24.00	09	10,454.00	250,896 96,175				250,896 96,175
5240010	MESNZ7012	EA	PRINCIPAL EXECUTIVE/MANAGER G	1	1.00	24.00	09	10,454.00	250,896 96,175				250,896 96,175
5240011	MENNZ0119	AA	EXECUTIVE SUPPORT SPECIALIST 2	1	1.00	24.00	02	2,967.00	71,208 49,654				71,208 49,654
5241000	B	Y7500	AE BOARD AND COMMISSION MEMBER		.00	.00	00	0.00	240 18				240 18
5241001	B	Y7500	AE BOARD AND COMMISSION MEMBER		.00	.00	00	0.00	240 18				240 18
5241002	B	Y7500	AE BOARD AND COMMISSION MEMBER		.00	.00	00	0.00	240 18				240 18
5241003	B	Y7500	AE BOARD AND COMMISSION MEMBER		.00	.00	00	0.00	240 18				240 18
5241004	B	Y7500	AE BOARD AND COMMISSION MEMBER		.00	.00	00	0.00	240 18				240 18

REPORT: PACKAGE FISCAL IMPACT REPORT

2013-15

PROD FILE

AGENCY:52400 OREGON EDUCATION INVESTMENT BD

PICS SYSTEM: BUDGET PREPARATION

SUMMARY XREF:001-00-00 Oregon Education Investment Bo

PACKAGE: 101 - OEIB Board and Staff

POSITION NUMBER	CLASS	COMP	CLASS NAME	POS CNT	FTE	MOS	STEP	RATE	GF SAL/OPE	OF SAL/OPE	FF SAL/OPE	LF SAL/OPE	AF SAL/OPE
5241005	B	Y7500	AE BOARD AND COMMISSION MEMBER		.00	.00	00	0.00	240 18				240 18
5241006	B	Y7500	AE BOARD AND COMMISSION MEMBER		.00	.00	00	0.00	240 18				240 18
5241007	B	Y7500	AE BOARD AND COMMISSION MEMBER		.00	.00	00	0.00	240 18				240 18
5241008	B	Y7500	AE BOARD AND COMMISSION MEMBER		.00	.00	00	0.00	240 18				240 18
5241009	B	Y7500	AE BOARD AND COMMISSION MEMBER		.00	.00	00	0.00	240 18				240 18
5241010	B	Y7500	AE BOARD AND COMMISSION MEMBER		.00	.00	00	0.00	240 18				240 18
5241011	B	Y7500	AE BOARD AND COMMISSION MEMBER		.00	.00	00	0.00	240 18				240 18
TOTAL PICS SALARY									2,222,832				2,222,832
TOTAL PICS OPE									914,859				914,859
TOTAL PICS PERSONAL SERVICES =									11	11.00	264.00		3,137,691

REPORT: PACKAGE FISCAL IMPACT REPORT

2013-15

PROD FILE

AGENCY:52400 OREGON EDUCATION INVESTMENT BD

PICS SYSTEM: BUDGET PREPARATION

SUMMARY XREF:001-00-00 Oregon Education Investment Bo

PACKAGE: 102 - Educational Research Capacity

POSITION NUMBER	CLASS	COMP	CLASS NAME	POS CNT	FTE	MOS	STEP	RATE	GF SAL/OPE	OF SAL/OPE	FF SAL/OPE	LF SAL/OPE	AF SAL/OPE
5240012	MESNZ7010	AA	PRINCIPAL EXECUTIVE/MANAGER F	1	1.00	24.00	02	6,134.00	147,216 69,963				147,216 69,963
5240013	UA	C1117	AA RESEARCH ANALYST 3	1	1.00	24.00	02	3,652.00	87,648 54,047				87,648 54,047
5240014	UA	C1117	AA RESEARCH ANALYST 3	1	1.00	24.00	02	3,652.00	87,648 54,047				87,648 54,047
5240015	UA	C1117	AA RESEARCH ANALYST 3	1	1.00	24.00	02	3,652.00	87,648 54,047				87,648 54,047
5240016	UA	C1117	AA RESEARCH ANALYST 3	1	1.00	24.00	02	3,652.00	87,648 54,047				87,648 54,047
5240017	UA	C1117	AA RESEARCH ANALYST 3	1	1.00	24.00	02	3,652.00	87,648 54,047				87,648 54,047
5240018	UA	C1117	AA RESEARCH ANALYST 3	1	1.00	24.00	02	3,652.00	87,648 54,047				87,648 54,047
5240019	UA	C0108	AA ADMINISTRATIVE SPECIALIST 2	1	1.00	24.00	02	2,662.00	63,888 47,697				63,888 47,697
TOTAL PICS SALARY									736,992				736,992
TOTAL PICS OPE									441,942				441,942
TOTAL PICS PERSONAL SERVICES =				8	8.00	192.00			1,178,934				1,178,934

Program Unit Appropriated Fund Group and Category Summary  
 2013-15 Biennium  
 Oregon Education Investment Board

Version: Y - 01 - Governor's Budget  
 Cross Reference Number: 52400-001-00-00-00000

Description	2009-11 Actuals	2011-13 Leg Adopted Budget	2011-13 Leg Approved Budget	2013-15 Agency Request Budget	2013-15 Governor's Budget	2013-15 Leg Adopted Budget
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**LIMITED BUDGET (Policy Packages)**

**PRIORITY 0**

**092 PERS TAXATION POLICY**

**PERSONAL SERVICES**

General Fund	-	-	-	-	(13,108)	-
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**093 OTHER PERS ADJUSTMENTS**

**PERSONAL SERVICES**

General Fund	-	-	-	-	(104,737)	-
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**101 OEIB BOARD AND STAFF**

**PERSONAL SERVICES**

General Fund	-	-	-	-	3,517,926	-
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**SERVICES & SUPPLIES**

General Fund	-	-	-	-	1,203,116	-
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**AUTHORIZED POSITIONS**

-	-	-	-	-	11	-
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**AUTHORIZED FTE**

-	-	-	-	-	11.00	-
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**102 EDUCATIONAL RESEARCH CAPACITY**

**PERSONAL SERVICES**

General Fund	-	-	-	-	1,208,495	-
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**SERVICES & SUPPLIES**

General Fund	-	-	-	-	187,140	-
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**AUTHORIZED POSITIONS**

-	-	-	-	-	8	-
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Program Unit Appropriated Fund Group and Category Summary  
 2013-15 Biennium  
 Oregon Education Investment Board

Version: Y - 01 - Governor's Budget  
 Cross Reference Number: 52400-001-00-00-00000

Description	2009-11 Actuals	2011-13 Leg Adopted Budget	2011-13 Leg Approved Budget	2013-15 Agency Request Budget	2013-15 Governor's Budget	2013-15 Leg Adopted Budget
AUTHORIZED FTE	-	-	-	-	8.00	-
103 PK-20 PROGRAM INITIATIVES						
SERVICES & SUPPLIES						
General Fund	-	-	-	-	1,250,000	-
<b>TOTAL LIMITED BUDGET (Policy Packages)</b>						
General Fund	-	-	-	-	7,248,832	-
<b>AUTHORIZED POSITIONS</b>	-	-	-	-	19	-
<b>AUTHORIZED FTE</b>	-	-	-	-	19.00	-
<b>TOTAL LIMITED BUDGET (Including Packages)</b>						
General Fund	-	-	-	-	7,248,832	-
<b>AUTHORIZED POSITIONS</b>	-	-	-	-	19	-
<b>AUTHORIZED FTE</b>	-	-	-	-	19.00	-
<b>OPERATING BUDGET</b>						
General Fund	-	-	-	-	7,248,832	-
<b>AUTHORIZED POSITIONS</b>	-	-	-	-	19	-
<b>AUTHORIZED FTE</b>	-	-	-	-	19.00	-
<b>TOTAL BUDGET</b>						
General Fund	-	-	-	-	7,248,832	-
<b>AUTHORIZED POSITIONS</b>	-	-	-	-	19	-
<b>AUTHORIZED FTE</b>	-	-	-	-	19.00	-

# ORBITS Budget Narrative

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## **Annual Performance Progress Report**

The Chief Education Officer was hired in July 2012, and there is no annual performance progress report at this time. A performance management system, focused on employee development towards organizational improvement, is being developed. It will:

- Define performance goals with measurable outcomes
- Explicitly link performance goals to strategic initiatives
- Appraise performance and provide constructive feedback
- Define and track professional development needs and activities

# ORBITS Budget Narrative

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## **Affirmative Action Statement**

The Oregon Education Investment Board is committed to equal employment opportunity and to an affirmative action program.

Additionally, verbal, visual, and/or physical forms of racial, sexual, gender based, religious, and national origin harassment, and harassment motivated by an individual's real or perceived disability will not be tolerated. Training and education will be provided as a means of working toward the elimination of such inappropriate and unprofessional behavior.

Proactive and creative programs, approaches, and processes will be used to ensure a work environment that allows every individual the opportunity to reach his/her potential as an OEIB employee.



**Oregon Education Investment Board**

**Summary Cross Reference Listing and Packages**  
**2013-15 Biennium**

**Agency Number: 52400**

**BAM Analyst: McGee, Bill**

**Budget Coordinator: Bowers, Angelique - (503)373-0735 X 0**

<b>Cross Reference Number</b>	<b>Cross Reference Description</b>	<b>Package Number</b>	<b>Priority</b>	<b>Package Description</b>	<b>Package Group</b>
001-00-00-00000	Oregon Education Investment Board	091	0	Statewide Administrative Savings	Policy Packages
001-00-00-00000	Oregon Education Investment Board	092	0	PERS Taxation Policy	Policy Packages
001-00-00-00000	Oregon Education Investment Board	093	0	Other PERS Adjustments	Policy Packages
001-00-00-00000	Oregon Education Investment Board	503	0	Transfer to Oregon Edu Investment Bd	Policy Packages
001-00-00-00000	Oregon Education Investment Board	101	0	OEIB Board and Staff	Policy Packages
001-00-00-00000	Oregon Education Investment Board	102	0	Educational Research Capacity	Policy Packages
001-00-00-00000	Oregon Education Investment Board	103	0	PK-20 Program Initiatives	Policy Packages
999-00-00-00000	Suspense	091	0	Statewide Administrative Savings	Policy Packages
999-00-00-00000	Suspense	092	0	PERS Taxation Policy	Policy Packages
999-00-00-00000	Suspense	093	0	Other PERS Adjustments	Policy Packages
999-00-00-00000	Suspense	503	0	Transfer to Oregon Edu Investment Bd	Policy Packages
999-00-00-00000	Suspense	101	0	OEIB Board and Staff	Policy Packages
999-00-00-00000	Suspense	102	0	Educational Research Capacity	Policy Packages
999-00-00-00000	Suspense	103	0	PK-20 Program Initiatives	Policy Packages

**Oregon Education Investment Board**

**Policy Package List by Priority  
2013-15 Biennium**

**Agency Number: 52400**

**BAM Analyst: McGee, Bill**

**Budget Coordinator: Bowers, Angelique - (503)373-0735 X 0**

<i>Priority</i>	<i>Policy Pkg Number</i>	<i>Policy Pkg Description</i>	<i>Summary Cross Reference Number</i>	<i>Cross Reference Description</i>
0	091	Statewide Administrative Savings	001-00-00-00000	Oregon Education Investment Board
			999-00-00-00000	Suspense
	092	PERS Taxation Policy	001-00-00-00000	Oregon Education Investment Board
			999-00-00-00000	Suspense
	093	Other PERS Adjustments	001-00-00-00000	Oregon Education Investment Board
			999-00-00-00000	Suspense
	101	OEIB Board and Staff	001-00-00-00000	Oregon Education Investment Board
			999-00-00-00000	Suspense
	102	Educational Research Capacity	001-00-00-00000	Oregon Education Investment Board
			999-00-00-00000	Suspense
	103	PK-20 Program Initiatives	001-00-00-00000	Oregon Education Investment Board
			999-00-00-00000	Suspense
	503	Transfer to Oregon Edu Investment Bd	001-00-00-00000	Oregon Education Investment Board
			999-00-00-00000	Suspense

Description	2009-11 Actuals	2011-13 Leg Adopted Budget	2011-13 Leg Approved Budget	2013-15 Agency Request Budget	2013-15 Governor's Budget	2013-15 Leg Adopted Budget
<b>REVENUE CATEGORIES</b>						
<b>GENERAL FUND APPROPRIATION</b>						
<b>0050 General Fund Appropriation</b>						
8000 General Fund	-	-	-	-	7,248,832	-
<b>AVAILABLE REVENUES</b>						
8000 General Fund	-	-	-	-	7,248,832	-
<b>TOTAL AVAILABLE REVENUES</b>	-	-	-	-	<b>\$7,248,832</b>	-
<b>EXPENDITURES</b>						
<b>PERSONAL SERVICES</b>						
<b>SALARIES &amp; WAGES</b>						
<b>3110 Class/Unclass Sal. and Per Diem</b>						
8000 General Fund	-	-	-	-	2,959,824	-
<b>3190 All Other Differential</b>						
8000 General Fund	-	-	-	-	287,904	-
<b>SALARIES &amp; WAGES</b>						
8000 General Fund	-	-	-	-	3,247,728	-
<b>TOTAL SALARIES &amp; WAGES</b>	-	-	-	-	<b>\$3,247,728</b>	-
<b>OTHER PAYROLL EXPENSES</b>						
<b>3210 Empl. Rel. Bd. Assessments</b>						
8000 General Fund	-	-	-	-	760	-
<b>3220 Public Employees' Retire Cont</b>						
8000 General Fund	-	-	-	-	618,795	-
<b>3230 Social Security Taxes</b>						

Description	2009-11 Actuals	2011-13 Leg Adopted Budget	2011-13 Leg Approved Budget	2013-15 Agency Request Budget	2013-15 Governor's Budget	2013-15 Leg Adopted Budget
8000 General Fund	-	-	-	-	233,021	-
<b>3250 Worker's Comp. Assess. (WCD)</b>						
8000 General Fund	-	-	-	-	1,121	-
<b>3260 Mass Transit Tax</b>						
8000 General Fund	-	-	-	-	19,488	-
<b>3270 Flexible Benefits</b>						
8000 General Fund	-	-	-	-	580,032	-
<b>OTHER PAYROLL EXPENSES</b>						
8000 General Fund	-	-	-	-	1,453,217	-
<b>TOTAL OTHER PAYROLL EXPENSES</b>	-	-	-	-	<b>\$1,453,217</b>	-
<b>P.S. BUDGET ADJUSTMENTS</b>						
<b>3465 Reconciliation Adjustment</b>						
8000 General Fund	-	-	-	-	25,476	-
<b>3991 PERS Policy Adjustment</b>						
8000 General Fund	-	-	-	-	(117,845)	-
<b>P.S. BUDGET ADJUSTMENTS</b>						
8000 General Fund	-	-	-	-	(92,369)	-
<b>TOTAL P.S. BUDGET ADJUSTMENTS</b>	-	-	-	-	<b>(\$92,369)</b>	-
<b>PERSONAL SERVICES</b>						
8000 General Fund	-	-	-	-	4,608,576	-
<b>TOTAL PERSONAL SERVICES</b>	-	-	-	-	<b>\$4,608,576</b>	-
<b>SERVICES &amp; SUPPLIES</b>						
<b>4100 Instate Travel</b>						

Description	2009-11 Actuals	2011-13 Leg Adopted Budget	2011-13 Leg Approved Budget	2013-15 Agency Request Budget	2013-15 Governor's Budget	2013-15 Leg Adopted Budget
8000 General Fund	-	-	-	-	125,610	-
<b>4150 Employee Training</b>						
8000 General Fund	-	-	-	-	41,869	-
<b>4175 Office Expenses</b>						
8000 General Fund	-	-	-	-	42,544	-
<b>4200 Telecommunications</b>						
8000 General Fund	-	-	-	-	47,944	-
<b>4225 State Gov. Service Charges</b>						
8000 General Fund	-	-	-	-	285,000	-
<b>4275 Publicity and Publications</b>						
8000 General Fund	-	-	-	-	57,599	-
<b>4300 Professional Services</b>						
8000 General Fund	-	-	-	-	1,874,000	-
<b>4375 Employee Recruitment and Develop</b>						
8000 General Fund	-	-	-	-	7,594	-
<b>4400 Dues and Subscriptions</b>						
8000 General Fund	-	-	-	-	7,522	-
<b>4425 Facilities Rental and Taxes</b>						
8000 General Fund	-	-	-	-	64,144	-
<b>4650 Other Services and Supplies</b>						
8000 General Fund	-	-	-	-	12,927	-
<b>4700 Expendable Prop 250 - 5000</b>						
8000 General Fund	-	-	-	-	37,697	-

**Oregon Education Investment Board**

**Agency Number: 52400**

Budget Support - Detail Revenues and Expenditures

Cross Reference Number: 52400-000-00-00-00000

2013-15 Biennium

Oregon Education Investment Board

<i>Description</i>	<i>2009-11 Actuals</i>	<i>2011-13 Leg Adopted Budget</i>	<i>2011-13 Leg Approved Budget</i>	<i>2013-15 Agency Request Budget</i>	<i>2013-15 Governor's Budget</i>	<i>2013-15 Leg Adopted Budget</i>
<b>4715 IT Expendable Property</b>						
8000 General Fund	-	-	-	-	35,806	-
<b>SERVICES &amp; SUPPLIES</b>						
8000 General Fund	-	-	-	-	2,640,256	-
<b>TOTAL SERVICES &amp; SUPPLIES</b>	-	-	-	-	<b>\$2,640,256</b>	-
<b>EXPENDITURES</b>						
8000 General Fund	-	-	-	-	7,248,832	-
<b>TOTAL EXPENDITURES</b>	-	-	-	-	<b>\$7,248,832</b>	-
<b>AUTHORIZED POSITIONS</b>						
8150 Class/Unclass Positions	-	-	-	-	19	-
<b>TOTAL AUTHORIZED POSITIONS</b>	-	-	-	-	<b>19</b>	-
<b>AUTHORIZED FTE</b>						
8250 Class/Unclass FTE Positions	-	-	-	-	19.00	-
<b>TOTAL AUTHORIZED FTE</b>	-	-	-	-	<b>19.00</b>	-

Description	2009-11 Actuals	2011-13 Leg Adopted Budget	2011-13 Leg Approved Budget	2013-15 Agency Request Budget	2013-15 Governor's Budget	2013-15 Leg Adopted Budget
<b>REVENUE CATEGORIES</b>						
<b>GENERAL FUND APPROPRIATION</b>						
<b>0050 General Fund Appropriation</b>						
8000 General Fund	-	-	-	-	7,248,832	-
<b>AVAILABLE REVENUES</b>						
8000 General Fund	-	-	-	-	7,248,832	-
<b>TOTAL AVAILABLE REVENUES</b>	-	-	-	-	<b>\$7,248,832</b>	-
<b>EXPENDITURES</b>						
<b>PERSONAL SERVICES</b>						
<b>SALARIES &amp; WAGES</b>						
<b>3110 Class/Unclass Sal. and Per Diem</b>						
8000 General Fund	-	-	-	-	2,959,824	-
<b>3190 All Other Differential</b>						
8000 General Fund	-	-	-	-	287,904	-
<b>SALARIES &amp; WAGES</b>						
8000 General Fund	-	-	-	-	3,247,728	-
<b>TOTAL SALARIES &amp; WAGES</b>	-	-	-	-	<b>\$3,247,728</b>	-
<b>OTHER PAYROLL EXPENSES</b>						
<b>3210 Empl. Rel. Bd. Assessments</b>						
8000 General Fund	-	-	-	-	760	-
<b>3220 Public Employees' Retire Cont</b>						
8000 General Fund	-	-	-	-	618,795	-
<b>3230 Social Security Taxes</b>						

Description	2009-11 Actuals	2011-13 Leg Adopted Budget	2011-13 Leg Approved Budget	2013-15 Agency Request Budget	2013-15 Governor's Budget	2013-15 Leg Adopted Budget
8000 General Fund	-	-	-	-	233,021	-
<b>3250 Worker's Comp. Assess. (WCD)</b>						
8000 General Fund	-	-	-	-	1,121	-
<b>3260 Mass Transit Tax</b>						
8000 General Fund	-	-	-	-	19,488	-
<b>3270 Flexible Benefits</b>						
8000 General Fund	-	-	-	-	580,032	-
<b>OTHER PAYROLL EXPENSES</b>						
8000 General Fund	-	-	-	-	1,453,217	-
<b>TOTAL OTHER PAYROLL EXPENSES</b>	-	-	-	-	<b>\$1,453,217</b>	-
<b>P.S. BUDGET ADJUSTMENTS</b>						
<b>3465 Reconciliation Adjustment</b>						
8000 General Fund	-	-	-	-	25,476	-
<b>3991 PERS Policy Adjustment</b>						
8000 General Fund	-	-	-	-	(117,845)	-
<b>P.S. BUDGET ADJUSTMENTS</b>						
8000 General Fund	-	-	-	-	(92,369)	-
<b>TOTAL P.S. BUDGET ADJUSTMENTS</b>	-	-	-	-	<b>(\$92,369)</b>	-
<b>PERSONAL SERVICES</b>						
8000 General Fund	-	-	-	-	4,608,576	-
<b>TOTAL PERSONAL SERVICES</b>	-	-	-	-	<b>\$4,608,576</b>	-
<b>SERVICES &amp; SUPPLIES</b>						
<b>4100 Instate Travel</b>						



Description	2009-11 Actuals	2011-13 Leg Adopted Budget	2011-13 Leg Approved Budget	2013-15 Agency Request Budget	2013-15 Governor's Budget	2013-15 Leg Adopted Budget
8000 General Fund	-	-	-	-	125,610	-
<b>4150 Employee Training</b>						
8000 General Fund	-	-	-	-	41,869	-
<b>4175 Office Expenses</b>						
8000 General Fund	-	-	-	-	42,544	-
<b>4200 Telecommunications</b>						
8000 General Fund	-	-	-	-	47,944	-
<b>4225 State Gov. Service Charges</b>						
8000 General Fund	-	-	-	-	285,000	-
<b>4275 Publicity and Publications</b>						
8000 General Fund	-	-	-	-	57,599	-
<b>4300 Professional Services</b>						
8000 General Fund	-	-	-	-	1,874,000	-
<b>4375 Employee Recruitment and Develop</b>						
8000 General Fund	-	-	-	-	7,594	-
<b>4400 Dues and Subscriptions</b>						
8000 General Fund	-	-	-	-	7,522	-
<b>4425 Facilities Rental and Taxes</b>						
8000 General Fund	-	-	-	-	64,144	-
<b>4650 Other Services and Supplies</b>						
8000 General Fund	-	-	-	-	12,927	-
<b>4700 Expendable Prop 250 - 5000</b>						
8000 General Fund	-	-	-	-	37,697	-

**Oregon Education Investment Board**

**Agency Number: 52400**

Budget Support - Detail Revenues and Expenditures

Cross Reference Number: 52400-001-00-00-00000

2013-15 Biennium

Oregon Education Investment Board

<i>Description</i>	<i>2009-11 Actuals</i>	<i>2011-13 Leg Adopted Budget</i>	<i>2011-13 Leg Approved Budget</i>	<i>2013-15 Agency Request Budget</i>	<i>2013-15 Governor's Budget</i>	<i>2013-15 Leg Adopted Budget</i>
<b>4715 IT Expendable Property</b>						
8000 General Fund	-	-	-	-	35,806	-
<b>SERVICES &amp; SUPPLIES</b>						
8000 General Fund	-	-	-	-	2,640,256	-
<b>TOTAL SERVICES &amp; SUPPLIES</b>	-	-	-	-	<b>\$2,640,256</b>	-
<b>EXPENDITURES</b>						
8000 General Fund	-	-	-	-	7,248,832	-
<b>TOTAL EXPENDITURES</b>	-	-	-	-	<b>\$7,248,832</b>	-
<b>AUTHORIZED POSITIONS</b>						
8150 Class/Unclass Positions	-	-	-	-	19	-
<b>TOTAL AUTHORIZED POSITIONS</b>	-	-	-	-	<b>19</b>	-
<b>AUTHORIZED FTE</b>						
8250 Class/Unclass FTE Positions	-	-	-	-	19.00	-
<b>TOTAL AUTHORIZED FTE</b>	-	-	-	-	<b>19.00</b>	-

Package Comparison Report - Detail  
 2013-15 Biennium  
 Oregon Education Investment Board

Cross Reference Number: 52400-001-00-00-00000  
 Package: PERS Taxation Policy  
 Pkg Group: POL Pkg Type: 090 Pkg Number: 092

Description	Agency Request Budget (V-01)	Governor's Budget (Y-01)	Column 2 Minus Column 1	% Change from Column 1 to Column 2
	Column 1	Column 2		

REVENUE CATEGORIES

GENERAL FUND APPROPRIATION

0050 General Fund Appropriation

8000 General Fund - (13,108) (13,108) 100.00%

AVAILABLE REVENUES

8000 General Fund - (13,108) (13,108) 100.00%

**TOTAL AVAILABLE REVENUES - (\$13,108) (\$13,108) 100.00%**

EXPENDITURES

PERSONAL SERVICES

P.S. BUDGET ADJUSTMENTS

3991 PERS Policy Adjustment

8000 General Fund - (13,108) (13,108) 100.00%

P.S. BUDGET ADJUSTMENTS

8000 General Fund - (13,108) (13,108) 100.00%

**TOTAL P.S. BUDGET ADJUSTMENTS - (\$13,108) (\$13,108) 100.00%**

PERSONAL SERVICES

8000 General Fund - (13,108) (13,108) 100.00%

**TOTAL PERSONAL SERVICES - (\$13,108) (\$13,108) 100.00%**

EXPENDITURES

**Oregon Education Investment Board**

**Agency Number: 52400**

Package Comparison Report - Detail  
 2013-15 Biennium  
 Oregon Education Investment Board

Cross Reference Number: 52400-001-00-00-00000  
 Package: PERS Taxation Policy  
 Pkg Group: POL Pkg Type: 090 Pkg Number: 092

Description	Agency Request Budget (V-01)	Governor's Budget (Y-01)	Column 2 Minus Column 1	% Change from Column 1 to Column 2
	Column 1	Column 2		
8000 General Fund	-	(13,108)	(13,108)	100.00%
<b>TOTAL EXPENDITURES</b>	-	<b>(\$13,108)</b>	<b>(\$13,108)</b>	<b>100.00%</b>
<b>ENDING BALANCE</b>				
8000 General Fund	-	-	0	0.00%
<b>TOTAL ENDING BALANCE</b>	-	-	<b>\$0</b>	<b>0.00%</b>

Package Comparison Report - Detail  
 2013-15 Biennium  
 Oregon Education Investment Board

Cross Reference Number: 52400-001-00-00-00000  
 Package: Other PERS Adjustments  
 Pkg Group: POL Pkg Type: 090 Pkg Number: 093

Description	Agency Request Budget (V-01)	Governor's Budget (Y-01)	Column 2 Minus Column 1	% Change from Column 1 to Column 2
	Column 1	Column 2		

REVENUE CATEGORIES

GENERAL FUND APPROPRIATION

0050 General Fund Appropriation

8000 General Fund - (104,737) (104,737) 100.00%

AVAILABLE REVENUES

8000 General Fund - (104,737) (104,737) 100.00%

**TOTAL AVAILABLE REVENUES - (\$104,737) (\$104,737) 100.00%**

EXPENDITURES

PERSONAL SERVICES

P.S. BUDGET ADJUSTMENTS

3991 PERS Policy Adjustment

8000 General Fund - (104,737) (104,737) 100.00%

P.S. BUDGET ADJUSTMENTS

8000 General Fund - (104,737) (104,737) 100.00%

**TOTAL P.S. BUDGET ADJUSTMENTS - (\$104,737) (\$104,737) 100.00%**

PERSONAL SERVICES

8000 General Fund - (104,737) (104,737) 100.00%

**TOTAL PERSONAL SERVICES - (\$104,737) (\$104,737) 100.00%**

EXPENDITURES

**Oregon Education Investment Board**

**Agency Number: 52400**

Package Comparison Report - Detail  
 2013-15 Biennium  
 Oregon Education Investment Board

Cross Reference Number: 52400-001-00-00-00000  
 Package: Other PERS Adjustments  
 Pkg Group: POL Pkg Type: 090 Pkg Number: 093

Description	Agency Request Budget (V-01)	Governor's Budget (Y-01)	Column 2 Minus Column 1	% Change from Column 1 to Column 2
	Column 1	Column 2		
8000 General Fund	-	(104,737)	(104,737)	100.00%
<b>TOTAL EXPENDITURES</b>	-	<b>(\$104,737)</b>	<b>(\$104,737)</b>	<b>100.00%</b>
<b>ENDING BALANCE</b>				
8000 General Fund	-	-	0	0.00%
<b>TOTAL ENDING BALANCE</b>	-	-	<b>\$0</b>	<b>0.00%</b>

Package Comparison Report - Detail  
 2013-15 Biennium  
 Oregon Education Investment Board

Cross Reference Number: 52400-001-00-00-00000  
 Package: OEIB Board and Staff  
 Pkg Group: POL Pkg Type: POL Pkg Number: 101

Description	Agency Request Budget (V-01)	Governor's Budget (Y-01)	Column 2 Minus Column 1	% Change from Column 1 to Column 2
	Column 1	Column 2		

REVENUE CATEGORIES

GENERAL FUND APPROPRIATION

0050 General Fund Appropriation

8000 General Fund	-	4,721,042	4,721,042	100.00%
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AVAILABLE REVENUES

8000 General Fund	-	4,721,042	4,721,042	100.00%
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<b>TOTAL AVAILABLE REVENUES</b>	<b>-</b>	<b>\$4,721,042</b>	<b>\$4,721,042</b>	<b>100.00%</b>
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EXPENDITURES

PERSONAL SERVICES

SALARIES & WAGES

3110 Class/Unclass Sal. and Per Diem

8000 General Fund	-	2,222,832	2,222,832	100.00%
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3190 All Other Differential

8000 General Fund	-	287,904	287,904	100.00%
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SALARIES & WAGES

8000 General Fund	-	2,510,736	2,510,736	100.00%
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<b>TOTAL SALARIES &amp; WAGES</b>	<b>-</b>	<b>\$2,510,736</b>	<b>\$2,510,736</b>	<b>100.00%</b>
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OTHER PAYROLL EXPENSES

3210 Empl. Rel. Bd. Assessments

Description	Agency Request Budget (V-01)	Governor's Budget (Y-01)	Column 2 Minus Column 1	% Change from Column 1 to Column 2
	Column 1	Column 2		
8000 General Fund	-	440	440	100.00%
<b>3220 Public Employees Retire Cont</b>				
8000 General Fund	-	478,248	478,248	100.00%
<b>3230 Social Security Taxes</b>				
8000 General Fund	-	176,642	176,642	100.00%
<b>3250 Workers Comp. Assess. (WCD)</b>				
8000 General Fund	-	649	649	100.00%
<b>3260 Mass Transit Tax</b>				
8000 General Fund	-	15,066	15,066	100.00%
<b>3270 Flexible Benefits</b>				
8000 General Fund	-	335,808	335,808	100.00%
<b>OTHER PAYROLL EXPENSES</b>				
8000 General Fund	-	1,006,853	1,006,853	100.00%
<b>TOTAL OTHER PAYROLL EXPENSES</b>	-	<b>\$1,006,853</b>	<b>\$1,006,853</b>	<b>100.00%</b>
<b>P.S. BUDGET ADJUSTMENTS</b>				
<b>3465 Reconciliation Adjustment</b>				
8000 General Fund	-	337	337	100.00%
<b>P.S. BUDGET ADJUSTMENTS</b>				
8000 General Fund	-	337	337	100.00%



**Oregon Education Investment Board**

**Agency Number: 52400**

Package Comparison Report - Detail  
 2013-15 Biennium  
 Oregon Education Investment Board

Cross Reference Number: 52400-001-00-00-00000  
 Package: OEIB Board and Staff  
 Pkg Group: POL Pkg Type: POL Pkg Number: 101

Description	Agency Request Budget (V-01)	Governor's Budget (Y-01)	Column 2 Minus Column 1	% Change from Column 1 to Column 2
	Column 1	Column 2		
<b>TOTAL P.S. BUDGET ADJUSTMENTS</b>	-	\$337	\$337	100.00%
<b>PERSONAL SERVICES</b>				
8000 General Fund	-	3,517,926	3,517,926	100.00%
<b>TOTAL PERSONAL SERVICES</b>	-	<b>\$3,517,926</b>	<b>\$3,517,926</b>	<b>100.00%</b>
<b>SERVICES &amp; SUPPLIES</b>				
<b>4100 Instate Travel</b>				
8000 General Fund	-	69,805	69,805	100.00%
<b>4150 Employee Training</b>				
8000 General Fund	-	19,586	19,586	100.00%
<b>4175 Office Expenses</b>				
8000 General Fund	-	22,286	22,286	100.00%
<b>4200 Telecommunications</b>				
8000 General Fund	-	27,011	27,011	100.00%
<b>4225 State Gov. Service Charges</b>				
8000 General Fund	-	285,000	285,000	100.00%
<b>4275 Publicity and Publications</b>				
8000 General Fund	-	3,042	3,042	100.00%
<b>4300 Professional Services</b>				
8000 General Fund	-	724,000	724,000	100.00%

Description	Agency Request Budget (V-01)	Governor's Budget (Y-01)	Column 2 Minus Column 1	% Change from Column 1 to Column 2
	Column 1	Column 2		
<b>4400 Dues and Subscriptions</b>				
8000 General Fund	-	3,086	3,086	100.00%
<b>4425 Facilities Rental and Taxes</b>				
8000 General Fund	-	37,136	37,136	100.00%
<b>4650 Other Services and Supplies</b>				
8000 General Fund	-	7,425	7,425	100.00%
<b>4700 Expendable Prop 250 - 5000</b>				
8000 General Fund	-	4,739	4,739	100.00%
<b>SERVICES &amp; SUPPLIES</b>				
8000 General Fund	-	1,203,116	1,203,116	100.00%
<b>TOTAL SERVICES &amp; SUPPLIES</b>	-	<b>\$1,203,116</b>	<b>\$1,203,116</b>	<b>100.00%</b>
<b>EXPENDITURES</b>				
8000 General Fund	-	4,721,042	4,721,042	100.00%
<b>TOTAL EXPENDITURES</b>	-	<b>\$4,721,042</b>	<b>\$4,721,042</b>	<b>100.00%</b>
<b>ENDING BALANCE</b>				
8000 General Fund	-	-	0	0.00%
<b>TOTAL ENDING BALANCE</b>	-	-	<b>\$0</b>	<b>0.00%</b>
<b>AUTHORIZED POSITIONS</b>				
8150 Class/Unclass Positions	-	11	11	100.00%

Description	Agency Request Budget (V-01)	Governor's Budget (Y-01)	Column 2 Minus Column 1	% Change from Column 1 to Column 2
	Column 1	Column 2		

**AUTHORIZED FTE**

8250 Class/Unclass FTE Positions	-	11.00	11.00	100.00%
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Package Comparison Report - Detail  
 2013-15 Biennium  
 Oregon Education Investment Board

Cross Reference Number: 52400-001-00-00-00000  
 Package: Educational Research Capacity  
 Pkg Group: POL Pkg Type: POL Pkg Number: 102

Description	Agency Request Budget (V-01)	Governor's Budget (Y-01)	Column 2 Minus Column 1	% Change from Column 1 to Column 2
	Column 1	Column 2		

**REVENUE CATEGORIES**

**GENERAL FUND APPROPRIATION**

**0050 General Fund Appropriation**

8000 General Fund	-	1,395,635	1,395,635	100.00%
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**AVAILABLE REVENUES**

8000 General Fund	-	1,395,635	1,395,635	100.00%
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<b>TOTAL AVAILABLE REVENUES</b>	-	<b>\$1,395,635</b>	<b>\$1,395,635</b>	<b>100.00%</b>
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**EXPENDITURES**

**PERSONAL SERVICES**

**SALARIES & WAGES**

**3110 Class/Unclass Sal. and Per Diem**

8000 General Fund	-	736,992	736,992	100.00%
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**SALARIES & WAGES**

8000 General Fund	-	736,992	736,992	100.00%
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<b>TOTAL SALARIES &amp; WAGES</b>	-	<b>\$736,992</b>	<b>\$736,992</b>	<b>100.00%</b>
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**OTHER PAYROLL EXPENSES**

**3210 Empl. Rel. Bd. Assessments**

8000 General Fund	-	320	320	100.00%
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**3220 Public Employees Retire Cont**

Description	Agency Request Budget (V-01)	Governor's Budget (Y-01)	Column 2 Minus Column 1	% Change from Column 1 to Column 2
	Column 1	Column 2		
8000 General Fund	-	140,547	140,547	100.00%
<b>3230 Social Security Taxes</b>				
8000 General Fund	-	56,379	56,379	100.00%
<b>3250 Workers Comp. Assess. (WCD)</b>				
8000 General Fund	-	472	472	100.00%
<b>3260 Mass Transit Tax</b>				
8000 General Fund	-	4,422	4,422	100.00%
<b>3270 Flexible Benefits</b>				
8000 General Fund	-	244,224	244,224	100.00%
<b>OTHER PAYROLL EXPENSES</b>				
8000 General Fund	-	446,364	446,364	100.00%
<b>TOTAL OTHER PAYROLL EXPENSES</b>	-	<b>\$446,364</b>	<b>\$446,364</b>	<b>100.00%</b>
<b>P.S. BUDGET ADJUSTMENTS</b>				
<b>3465 Reconciliation Adjustment</b>				
8000 General Fund	-	25,139	25,139	100.00%
<b>P.S. BUDGET ADJUSTMENTS</b>				
8000 General Fund	-	25,139	25,139	100.00%
<b>TOTAL P.S. BUDGET ADJUSTMENTS</b>	-	<b>\$25,139</b>	<b>\$25,139</b>	<b>100.00%</b>

**PERSONAL SERVICES**

Description	Agency Request Budget (V-01)	Governor's Budget (Y-01)	Column 2 Minus Column 1	% Change from Column 1 to Column 2
	Column 1	Column 2		
8000 General Fund	-	1,208,495	1,208,495	100.00%
<b>TOTAL PERSONAL SERVICES</b>	-	<b>\$1,208,495</b>	<b>\$1,208,495</b>	<b>100.00%</b>
<b>SERVICES &amp; SUPPLIES</b>				
<b>4100 Instate Travel</b>				
8000 General Fund	-	5,805	5,805	100.00%
<b>4150 Employee Training</b>				
8000 General Fund	-	22,283	22,283	100.00%
<b>4175 Office Expenses</b>				
8000 General Fund	-	20,258	20,258	100.00%
<b>4200 Telecommunications</b>				
8000 General Fund	-	20,933	20,933	100.00%
<b>4275 Publicity and Publications</b>				
8000 General Fund	-	4,557	4,557	100.00%
<b>4375 Employee Recruitment and Develop</b>				
8000 General Fund	-	7,594	7,594	100.00%
<b>4400 Dues and Subscriptions</b>				
8000 General Fund	-	4,436	4,436	100.00%
<b>4425 Facilities Rental and Taxes</b>				
8000 General Fund	-	27,008	27,008	100.00%

**Oregon Education Investment Board**

**Agency Number: 52400**

Package Comparison Report - Detail  
 2013-15 Biennium  
 Oregon Education Investment Board

Cross Reference Number: 52400-001-00-00-00000  
 Package: Educational Research Capacity  
 Pkg Group: POL Pkg Type: POL Pkg Number: 102

Description	Agency Request Budget (V-01)	Governor's Budget (Y-01)	Column 2 Minus Column 1	% Change from Column 1 to Column 2
	Column 1	Column 2		
<b>4650 Other Services and Supplies</b>				
8000 General Fund	-	5,502	5,502	100.00%
<b>4700 Expendable Prop 250 - 5000</b>				
8000 General Fund	-	32,958	32,958	100.00%
<b>4715 IT Expendable Property</b>				
8000 General Fund	-	35,806	35,806	100.00%
<b>SERVICES &amp; SUPPLIES</b>				
8000 General Fund	-	187,140	187,140	100.00%
<b>TOTAL SERVICES &amp; SUPPLIES</b>	-	<b>\$187,140</b>	<b>\$187,140</b>	<b>100.00%</b>
<b>EXPENDITURES</b>				
8000 General Fund	-	1,395,635	1,395,635	100.00%
<b>TOTAL EXPENDITURES</b>	-	<b>\$1,395,635</b>	<b>\$1,395,635</b>	<b>100.00%</b>
<b>ENDING BALANCE</b>				
8000 General Fund	-	-	0	0.00%
<b>TOTAL ENDING BALANCE</b>	-	-	<b>\$0</b>	<b>0.00%</b>
<b>AUTHORIZED POSITIONS</b>				
8150 Class/Unclass Positions	-	8	8	100.00%
<b>AUTHORIZED FTE</b>				
8250 Class/Unclass FTE Positions	-	8.00	8.00	100.00%

Package Comparison Report - Detail  
 2013-15 Biennium  
 Oregon Education Investment Board

Cross Reference Number: 52400-001-00-00-00000  
 Package: PK-20 Program Initiatives  
 Pkg Group: POL Pkg Type: POL Pkg Number: 103

Description	Agency Request Budget (V-01)	Governor's Budget (Y-01)	Column 2 Minus Column 1	% Change from Column 1 to Column 2
	Column 1	Column 2		

REVENUE CATEGORIES

GENERAL FUND APPROPRIATION

0050 General Fund Appropriation

8000 General Fund - 1,250,000 1,250,000 100.00%

AVAILABLE REVENUES

8000 General Fund - 1,250,000 1,250,000 100.00%

**TOTAL AVAILABLE REVENUES - \$1,250,000 \$1,250,000 100.00%**

EXPENDITURES

SERVICES & SUPPLIES

4100 Instate Travel

8000 General Fund - 50,000 50,000 100.00%

4275 Publicity and Publications

8000 General Fund - 50,000 50,000 100.00%

4300 Professional Services

8000 General Fund - 1,150,000 1,150,000 100.00%

SERVICES & SUPPLIES

8000 General Fund - 1,250,000 1,250,000 100.00%

**TOTAL SERVICES & SUPPLIES - \$1,250,000 \$1,250,000 100.00%**

EXPENDITURES



Description	Agency Request Budget (V-01)	Governor's Budget (Y-01)	Column 2 Minus Column 1	% Change from Column 1 to Column 2
	Column 1	Column 2		
8000 General Fund	-	1,250,000	1,250,000	100.00%
<b>TOTAL EXPENDITURES</b>	-	<b>\$1,250,000</b>	<b>\$1,250,000</b>	<b>100.00%</b>
<b>ENDING BALANCE</b>				
8000 General Fund	-	-	0	0.00%
<b>TOTAL ENDING BALANCE</b>	-	-	<b>\$0</b>	<b>0.00%</b>

PKG	CLASS	COMP	DESCRIPTION	POS CNT	FTE	MOS	AVERAGE RATE	GF SAL	OF SAL	FF SAL	LF SAL	AF SAL
101	B	Y7500	AE BOARD AND COMMISSION MEMBER		.00	.00	0.00	2,880				2,880
101	MENNZ0119	AA	EXECUTIVE SUPPORT SPECIALIST 2	2	2.00	48.00	3,468.50	166,488				166,488
101	MENNZ0830	AA	EXECUTIVE ASSISTANT	2	2.00	48.00	4,834.00	232,032				232,032
101	MESNZ7012	EA	PRINCIPAL EXECUTIVE/MANAGER G	5	5.00	120.00	10,454.00	1,254,480				1,254,480
101	MESNZ7014	EA	PRINCIPAL EXECUTIVE/MANAGER H	1	1.00	24.00	11,527.00	276,648				276,648
101	MESNZ7016	AA	PRINCIPAL EXECUTIVE/MANAGER I	1	1.00	24.00	12,096.00	290,304				290,304
101				11	11.00	264.00	3,854.08	2,222,832				2,222,832

REPORT: SUMMARY LIST BY PKG BY SUMMARY XREF

2013-15

PROD FILE

AGENCY:52400 OREGON EDUCATION INVESTMENT BD

PICS SYSTEM: BUDGET PREPARATION

SUMMARY XREF:001-00-00 102 Oregon Education Inv

PKG	CLASS	COMP	DESCRIPTION	POS CNT	FTE	MOS	AVERAGE RATE	GF SAL	OF SAL	FF SAL	LF SAL	AF SAL
102	MESNZ7010	AA	PRINCIPAL EXECUTIVE/MANAGER F	1	1.00	24.00	6,134.00	147,216				147,216
102	UA	C0108	AA ADMINISTRATIVE SPECIALIST 2	1	1.00	24.00	2,662.00	63,888				63,888
102	UA	C1117	AA RESEARCH ANALYST 3	6	6.00	144.00	3,652.00	525,888				525,888
102				8	8.00	192.00	3,838.50	736,992				736,992
				19	19.00	456.00	3,850.18	2,959,824				2,959,824
				19	19.00	456.00	3,850.18	2,959,824				2,959,824

REPORT: SUMMARY LIST BY PKG BY SUMMARY XREF

2013-15

PROD FILE

AGENCY:52400 OREGON EDUCATION INVESTMENT BD

PICS SYSTEM: BUDGET PREPARATION

SUMMARY XREF:001-00-00 102 Oregon Education Inv

PKG	CLASS	COMP	DESCRIPTION	POS CNT	FTE	MOS	AVERAGE RATE	GF SAL	OF SAL	FF SAL	LF SAL	AF SAL
				19	19.00	456.00	3,850.18	2,959,824				2,959,824

PKG	CLASS	COMP	DESCRIPTION	POS CNT	FTE	MOS	AVERAGE RATE	GF SAL	OF SAL	FF SAL	LF SAL	AF SAL
101	B	Y7500	AE BOARD AND COMMISSION MEMBER		.00	.00	0.00	2,880				2,880
101	MENNZ0119	AA	EXECUTIVE SUPPORT SPECIALIST 2	2	2.00	48.00	3,468.50	166,488				166,488
101	MENNZ0830	AA	EXECUTIVE ASSISTANT	2	2.00	48.00	4,834.00	232,032				232,032
102	MESNZ7010	AA	PRINCIPAL EXECUTIVE/MANAGER F	1	1.00	24.00	6,134.00	147,216				147,216
101	MESNZ7012	EA	PRINCIPAL EXECUTIVE/MANAGER G	5	5.00	120.00	10,454.00	1,254,480				1,254,480
101	MESNZ7014	EA	PRINCIPAL EXECUTIVE/MANAGER H	1	1.00	24.00	11,527.00	276,648				276,648
101	MESNZ7016	AA	PRINCIPAL EXECUTIVE/MANAGER I	1	1.00	24.00	12,096.00	290,304				290,304
102	UA	C0108	AA ADMINISTRATIVE SPECIALIST 2	1	1.00	24.00	2,662.00	63,888				63,888
102	UA	C1117	AA RESEARCH ANALYST 3	6	6.00	144.00	3,652.00	525,888				525,888
				19	19.00	456.00	3,850.18	2,959,824				2,959,824

PKG	CLASS	COMP	DESCRIPTION	POS CNT	FTE	MOS	AVERAGE RATE	GF SAL	OF SAL	FF SAL	LF SAL	AF SAL
				19	19.00	456.00	3,850.18	2,959,824				2,959,824

POSITION NUMBER	AUTH NO	ORG STRUC	F POS PKG Y TYP	CLASS COMP	S T POS RNG P	CNT	FTE	BUDGET RATE	MOS	GF SAL	OF SAL	FF SAL	LF SAL	T R K
5240001	001213450	001-01-00-00000	101 0 PF	MESNZ7016 AA	42X 09	1	1.00	12,096.00	24.00	290,304				
EST DATE: 2013/07/01 EXP DATE: 9999/01/01														
5240002	001213460	001-01-00-00000	101 0 PF	MESNZ7014 EA	40 09	1	1.00	11,527.00	24.00	276,648				
EST DATE: 2013/07/01 EXP DATE: 9999/01/01														
5240003	001213470	001-01-00-00000	101 0 PF	MESNZ7012 EA	38 09	1	1.00	10,454.00	24.00	250,896				
EST DATE: 2013/07/01 EXP DATE: 9999/01/01														
5240004	001213480	001-01-00-00000	101 0 PF	MESNZ7012 EA	38 09	1	1.00	10,454.00	24.00	250,896				
EST DATE: 2013/07/01 EXP DATE: 9999/01/01														
5240005	001213490	001-01-00-00000	101 0 PF	MESNZ7012 EA	38 09	1	1.00	10,454.00	24.00	250,896				
EST DATE: 2013/07/01 EXP DATE: 9999/01/01														
5240006	001213500	001-01-00-00000	101 0 PF	MENNZ0830 AA	25 04	1	1.00	4,364.00	24.00	104,736				
EST DATE: 2013/07/01 EXP DATE: 9999/01/01														
5240007	001213510	001-01-00-00000	101 0 PF	MENNZ0830 AA	25 08	1	1.00	5,304.00	24.00	127,296				
EST DATE: 2013/07/01 EXP DATE: 9999/01/01														
5240008	001213520	001-01-00-00000	101 0 PF	MENNZ0119 AA	19 08	1	1.00	3,970.00	24.00	95,280				
EST DATE: 2013/07/01 EXP DATE: 9999/01/01														
5240009	001213530	001-01-00-00000	101 0 PF	MESNZ7012 EA	38 09	1	1.00	10,454.00	24.00	250,896				
EST DATE: 2013/07/01 EXP DATE: 9999/01/01														
5240010	001213540	001-01-00-00000	101 0 PF	MESNZ7012 EA	38 09	1	1.00	10,454.00	24.00	250,896				
EST DATE: 2013/07/01 EXP DATE: 9999/01/01														
5240011	001213550	001-01-00-00000	101 0 PF	MENNZ0119 AA	19 02	1	1.00	2,967.00	24.00	71,208				
EST DATE: 2013/07/01 EXP DATE: 9999/01/01														
5241000	001213560	001-01-00-00000	101 0 PP B	Y7500 AE	00 00		.00	0.00	.00	240				B
EST DATE: 2013/07/01 EXP DATE: 9999/01/01														
5241001	001213570	001-01-00-00000	101 0 PP B	Y7500 AE	00 00		.00	0.00	.00	240				B
EST DATE: 2013/07/01 EXP DATE: 9999/01/01														
5241002	001213580	001-01-00-00000	101 0 PP B	Y7500 AE	00 00		.00	0.00	.00	240				B
EST DATE: 2013/07/01 EXP DATE: 9999/01/01														
5241003	001213590	001-01-00-00000	101 0 PP B	Y7500 AE	00 00		.00	0.00	.00	240				B
EST DATE: 2013/07/01 EXP DATE: 9999/01/01														
5241004	001213600	001-01-00-00000	101 0 PP B	Y7500 AE	00 00		.00	0.00	.00	240				B
EST DATE: 2013/07/01 EXP DATE: 9999/01/01														

POSITION NUMBER	AUTH NO	ORG STRUC	F POS PKG Y TYP	CLASS COMP	S T POS CNT	RNG P	FTE	BUDGET RATE	MOS	GF SAL	OF SAL	FF SAL	LF SAL	T R K
5241005	001213610	001-01-00-00000	101 0 PP B	Y7500 AE	00 00		.00	0.00	.00	240				B
EST DATE: 2013/07/01 EXP DATE: 9999/01/01														
5241006	001213620	001-01-00-00000	101 0 PP B	Y7500 AE	00 00		.00	0.00	.00	240				B
EST DATE: 2013/07/01 EXP DATE: 9999/01/01														
5241007	001213630	001-01-00-00000	101 0 PP B	Y7500 AE	00 00		.00	0.00	.00	240				B
EST DATE: 2013/07/01 EXP DATE: 9999/01/01														
5241008	001213640	001-01-00-00000	101 0 PP B	Y7500 AE	00 00		.00	0.00	.00	240				B
EST DATE: 2013/07/01 EXP DATE: 9999/01/01														
5241009	001213650	001-01-00-00000	101 0 PP B	Y7500 AE	00 00		.00	0.00	.00	240				B
EST DATE: 2013/07/01 EXP DATE: 9999/01/01														
5241010	001213660	001-01-00-00000	101 0 PF B	Y7500 AE	00 00		.00	0.00	.00	240				B
EST DATE: 2013/07/01 EXP DATE: 9999/01/01														
5241011	001213670	001-01-00-00000	101 0 PP B	Y7500 AE	00 00		.00	0.00	.00	240				B
EST DATE: 2013/07/01 EXP DATE: 9999/01/01														
5241012	001213680	001-01-00-00000	101 0 PP B	Y7500 AE	00 00		.00	0.00	.00					B
EST DATE: 2013/07/01 EXP DATE: 9999/01/01														
					101		11	11.00	264.00	2,222,832				



POSITION NUMBER	AUTH NO	ORG STRUC	F POS PKG Y TYP	CLASS COMP	S T POS RNG P	CNT	FTE	BUDGET RATE	MOS	GF SAL	OF SAL	FF SAL	LF SAL	T R K
5240012	001213690	001-01-00-00000	102 0 PF	MESNZ7010 AA	35X 02	1	1.00	6,134.00	24.00	147,216				
EST DATE: 2013/07/01 EXP DATE: 9999/01/01														
5240013	001213700	001-01-00-00000	102 0 PF	UA C1117 AA	26 02	1	1.00	3,652.00	24.00	87,648				
EST DATE: 2013/07/01 EXP DATE: 9999/01/01														
5240014	001213710	001-01-00-00000	102 0 PF	UA C1117 AA	26 02	1	1.00	3,652.00	24.00	87,648				
EST DATE: 2013/07/01 EXP DATE: 9999/01/01														
5240015	001213720	001-01-00-00000	102 0 PF	UA C1117 AA	26 02	1	1.00	3,652.00	24.00	87,648				
EST DATE: 2013/07/01 EXP DATE: 9999/01/01														
5240016	001213730	001-01-00-00000	102 0 PF	UA C1117 AA	26 02	1	1.00	3,652.00	24.00	87,648				
EST DATE: 2013/07/01 EXP DATE: 9999/01/01														
5240017	001213740	001-01-00-00000	102 0 PF	UA C1117 AA	26 02	1	1.00	3,652.00	24.00	87,648				
EST DATE: 2013/07/01 EXP DATE: 9999/01/01														
5240018	001213750	001-01-00-00000	102 0 PF	UA C1117 AA	26 02	1	1.00	3,652.00	24.00	87,648				
EST DATE: 2013/07/01 EXP DATE: 9999/01/01														
5240019	001213760	001-01-00-00000	102 0 PF	UA C0108 AA	19 02	1	1.00	2,662.00	24.00	63,888				
EST DATE: 2013/07/01 EXP DATE: 9999/01/01														
102						8	8.00		192.00	736,992				
						19	19.00		456.00	2,959,824				
						19	19.00		456.00	2,959,824				

POSITION NUMBER	AUTH NO	ORG STRUC	F POS PKG Y TYP	CLASS COMP	S T RNG P	POS CNT	FTE	BUDGET RATE	MOS	GF SAL	OF SAL	FF SAL	LF SAL	T R K
						19	19.00			456.00	2,959,824			

REPORT: PACKAGE FISCAL IMPACT REPORT

2013-15

PROD FILE

AGENCY:52400 OREGON EDUCATION INVESTMENT BD

PICS SYSTEM: BUDGET PREPARATION

SUMMARY XREF:001-00-00 Oregon Education Investment Bo

PACKAGE: 101 - OEIB Board and Staff

POSITION NUMBER	CLASS	COMP	CLASS NAME	POS CNT	FTE	MOS	STEP	RATE	GF SAL/OPE	OF SAL/OPE	FF SAL/OPE	LF SAL/OPE	AF SAL/OPE
5240001	MESNZ7016	AA	PRINCIPAL EXECUTIVE/MANAGER I	1	1.00	24.00	09	12,096.00	290,304 103,690				290,304 103,690
5240002	MESNZ7014	EA	PRINCIPAL EXECUTIVE/MANAGER H	1	1.00	24.00	09	11,527.00	276,648 101,086				276,648 101,086
5240003	MESNZ7012	EA	PRINCIPAL EXECUTIVE/MANAGER G	1	1.00	24.00	09	10,454.00	250,896 96,175				250,896 96,175
5240004	MESNZ7012	EA	PRINCIPAL EXECUTIVE/MANAGER G	1	1.00	24.00	09	10,454.00	250,896 96,175				250,896 96,175
5240005	MESNZ7012	EA	PRINCIPAL EXECUTIVE/MANAGER G	1	1.00	24.00	09	10,454.00	250,896 96,175				250,896 96,175
5240006	MENNZ0830	AA	EXECUTIVE ASSISTANT	1	1.00	24.00	04	4,364.00	104,736 58,612				104,736 58,612
5240007	MENNZ0830	AA	EXECUTIVE ASSISTANT	1	1.00	24.00	08	5,304.00	127,296 64,640				127,296 64,640
5240008	MENNZ0119	AA	EXECUTIVE SUPPORT SPECIALIST 2	1	1.00	24.00	08	3,970.00	95,280 56,086				95,280 56,086
5240009	MESNZ7012	EA	PRINCIPAL EXECUTIVE/MANAGER G	1	1.00	24.00	09	10,454.00	250,896 96,175				250,896 96,175
5240010	MESNZ7012	EA	PRINCIPAL EXECUTIVE/MANAGER G	1	1.00	24.00	09	10,454.00	250,896 96,175				250,896 96,175
5240011	MENNZ0119	AA	EXECUTIVE SUPPORT SPECIALIST 2	1	1.00	24.00	02	2,967.00	71,208 49,654				71,208 49,654
5241000	B	Y7500	AE BOARD AND COMMISSION MEMBER		.00	.00	00	0.00	240 18				240 18
5241001	B	Y7500	AE BOARD AND COMMISSION MEMBER		.00	.00	00	0.00	240 18				240 18
5241002	B	Y7500	AE BOARD AND COMMISSION MEMBER		.00	.00	00	0.00	240 18				240 18
5241003	B	Y7500	AE BOARD AND COMMISSION MEMBER		.00	.00	00	0.00	240 18				240 18
5241004	B	Y7500	AE BOARD AND COMMISSION MEMBER		.00	.00	00	0.00	240 18				240 18

REPORT: PACKAGE FISCAL IMPACT REPORT

2013-15

PROD FILE

AGENCY:52400 OREGON EDUCATION INVESTMENT BD

PICS SYSTEM: BUDGET PREPARATION

SUMMARY XREF:001-00-00 Oregon Education Investment Bo

PACKAGE: 101 - OEIB Board and Staff

POSITION NUMBER	CLASS	COMP	CLASS NAME	POS CNT	FTE	MOS	STEP	RATE	GF SAL/OPE	OF SAL/OPE	FF SAL/OPE	LF SAL/OPE	AF SAL/OPE
5241005	B	Y7500	AE BOARD AND COMMISSION MEMBER		.00	.00	00	0.00	240 18				240 18
5241006	B	Y7500	AE BOARD AND COMMISSION MEMBER		.00	.00	00	0.00	240 18				240 18
5241007	B	Y7500	AE BOARD AND COMMISSION MEMBER		.00	.00	00	0.00	240 18				240 18
5241008	B	Y7500	AE BOARD AND COMMISSION MEMBER		.00	.00	00	0.00	240 18				240 18
5241009	B	Y7500	AE BOARD AND COMMISSION MEMBER		.00	.00	00	0.00	240 18				240 18
5241010	B	Y7500	AE BOARD AND COMMISSION MEMBER		.00	.00	00	0.00	240 18				240 18
5241011	B	Y7500	AE BOARD AND COMMISSION MEMBER		.00	.00	00	0.00	240 18				240 18
TOTAL PICS SALARY									2,222,832				2,222,832
TOTAL PICS OPE									914,859				914,859
TOTAL PICS PERSONAL SERVICES =									---	---	---	---	---
				11	11.00		264.00		3,137,691				3,137,691

REPORT: PACKAGE FISCAL IMPACT REPORT

2013-15

PROD FILE

AGENCY:52400 OREGON EDUCATION INVESTMENT BD

PICS SYSTEM: BUDGET PREPARATION

SUMMARY XREF:001-00-00 Oregon Education Investment Bo

PACKAGE: 102 - Educational Research Capacity

POSITION NUMBER	CLASS	COMP	CLASS NAME	POS CNT	FTE	MOS	STEP	RATE	GF SAL/OPE	OF SAL/OPE	FF SAL/OPE	LF SAL/OPE	AF SAL/OPE
5240012	MESNZ7010	AA	PRINCIPAL EXECUTIVE/MANAGER F	1	1.00	24.00	02	6,134.00	147,216 69,963				147,216 69,963
5240013	UA	C1117	AA RESEARCH ANALYST 3	1	1.00	24.00	02	3,652.00	87,648 54,047				87,648 54,047
5240014	UA	C1117	AA RESEARCH ANALYST 3	1	1.00	24.00	02	3,652.00	87,648 54,047				87,648 54,047
5240015	UA	C1117	AA RESEARCH ANALYST 3	1	1.00	24.00	02	3,652.00	87,648 54,047				87,648 54,047
5240016	UA	C1117	AA RESEARCH ANALYST 3	1	1.00	24.00	02	3,652.00	87,648 54,047				87,648 54,047
5240017	UA	C1117	AA RESEARCH ANALYST 3	1	1.00	24.00	02	3,652.00	87,648 54,047				87,648 54,047
5240018	UA	C1117	AA RESEARCH ANALYST 3	1	1.00	24.00	02	3,652.00	87,648 54,047				87,648 54,047
5240019	UA	C0108	AA ADMINISTRATIVE SPECIALIST 2	1	1.00	24.00	02	2,662.00	63,888 47,697				63,888 47,697
TOTAL PICS SALARY									736,992				736,992
TOTAL PICS OPE									441,942				441,942
TOTAL PICS PERSONAL SERVICES =				8	8.00	192.00			1,178,934				1,178,934