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# MEMORANDUM

Legislative Fiscal Office  
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**To:** Education Subcommittee

**From:** Paul Siebert, Legislative Fiscal Office  
(503) 986-1843

**Date:** June 5, 2013

**Subject:** HB 5031 – Oregon University System  
Work Session Recommendations

## Oregon University System – Agency Totals

	2009-11 Actual	2011-13 Legislatively Approved	2013-15 Current Service Level	2013-15 LFO Recommended
General Fund	729,654,860	668,264,553	715,801,743	711,274,876
Lottery Funds	26,096,954	22,986,753	38,976,643	33,571,489
Other Funds	4,379,634,416	4,566,115,724	117,254	-
Federal Funds	70,823,654	4,922,075	671,650	-
<b>Total Funds</b>	<b>5,203,209,884</b>	<b>5,262,289,105</b>	<b>755,567,290</b>	<b>744,846,365</b>
Positions	18,619	18,650	-	-
FTE	12.898.40	13,015.02	-	-

Attached are the recommendations from the Legislative Fiscal Office for the Oregon University System.

### **Adjustments to Current Service Level:**

See attached “Work Session Presentation Report”.

### ***Accept LFO Recommendation***

*Move the LFO recommendation to HB 5031.*

**OR**

### ***Change LFO recommendation***

*Move the LFO recommendation to HB 5031, with modifications.*

### **Performance Measures**

See attached “Legislatively Proposed 2013-15 Key Performance Measures” form.

**Accept LFO Recommendation**

*Move the LFO recommendation on Key Performance Measures*

**OR**

**Change LFO recommendation**

*Move the LFO recommendation on Key Performance Measures, with modifications.*

**Recommended Changes to HB 5031:**

The Legislative Fiscal Office recommends a budget of \$711,274,876 General Fund and \$33,571,489 Lottery Funds and that House Bill 5031 be amended accordingly.

a)	<p><b>Page 1, Section 1; General Fund:</b> Delete section and insert - “There is appropriated to the Oregon Department of Administrative Services, for use by the Oregon University System, for the biennium beginning July 1, 2013, out of the General Fund, the following amounts for the following purposes:</p> <ul style="list-style-type: none"><li>(1) Public university support.....\$ 482,901,512</li><li>(2) State programs.....\$ 38,052,478</li><li>(3) Agricultural Experiment Station and Branch extension stations of Oregon State University.....\$ 55,175,282</li><li>(4) Oregon State University Extension Service .....\$ 39,909,526</li><li>(5) Forest Reseach Laboratory of Oregon State University.....\$ 6,070,772</li><li>(6) Debt service on outstanding general obligation bonds sold pursuant to Article XI-G of the Oregon Constitution for the benefit of Oregon public universities.....\$ 61,381,740</li><li>(7) Debt service on outstanding general obligation bonds sold pursuant to Article XI-Q of the Oregon Constitution for the benefit of Oregon public universities.....\$ 6,832,366</li><li>(8) Debt service on outstanding certificates of participation sold for the benefit of Oregon public universities.....\$ 8,387,588</li><li>(9) Repayment of energy loans to the State Department of Energy made to Oregon public universities.....\$ 12,395,916</li><li>(10) Debt-related costs.....\$ 167,696</li></ul>
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b)	<p><b>Page 1, Section 2; Lottery Funds Debt Service:</b> Delete section and insert - “Notwithstanding any other law limiting expenditures, the amount of \$25,571,489 is established for the biennium beginning July 1, 2013, as the maximum limits for payment of expenses from lottery monies allocated to the Oregon University System from the Administrative Services Economic Development Fund for debt service on lottery binds sold for the benefit of Oregon public universities.”</p>
c)	<p><b>Page 1, Section 3; Lottery Funds Sports Action:</b> Delete section and insert - “Notwithstanding any other law limiting expenditures, the amount of \$8,000,000 is established for the biennium beginning July 1, 2013, as the maximum limits for payment of expenses from lottery monies allocated to the Oregon University System from the Administrative Services Economic Development Fund Sports Lottery Account for the benefit of Oregon public universities.”</p>

*Move the LFO recommendations to amend HB 5031*

**HB 5031 Final Subcommittee Action:**

***Final Motion:***

*Move HB 5031 to the full committee with a “do pass” recommendation, as amended.*

LFO102 - Work Session Presentation Report  
2013-15 BienniumVersion: L - 01 - LFO Analyst Recommended  
Cross Reference: 58000-000-00-00-00000  
Higher Education, Dept of

	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	Total Funds	Positions	Full-Time Equivalent (FTE)
<b>2011-13 Agy. Leg. Adopted</b>	<b>669,169,003</b>	<b>22,959,136</b>	<b>2,247,259,031</b>	-	<b>2,232,952,699</b>	<b>4,922,075</b>	<b>5,177,261,944</b>	<b>18,650</b>	<b>13,015.02</b>
2011-13 Ebds, SS & Admin Act	(904,450)	27,617	82,221,554	-	3,682,440	-	85,027,161	-	-
Ways & Means Actions	-	-	-	-	-	-	-	-	-
<b>2011-13 Leg Approved Budget</b>	<b>668,264,553</b>	<b>22,986,753</b>	<b>2,329,480,585</b>	-	<b>2,236,635,139</b>	<b>4,922,075</b>	<b>5,262,289,105</b>	<b>18,650</b>	<b>13,015.02</b>
<b>2011-13 Leg Approved Budget (Base)</b>	<b>668,264,553</b>	<b>22,986,753</b>	<b>2,322,578,389</b>	-	<b>2,239,854,895</b>	<b>4,922,075</b>	<b>5,258,606,665</b>	<b>18,650</b>	<b>13,015.02</b>
Summary of Base Adjustments	1,982,519	14,094,654	(339,790,885)	-	(2,239,530,370)	(4,250,425)	(2,567,494,507)	(2,816)	(2,518.69)
<b>2013-15 Base Budget</b>	<b>670,247,072</b>	<b>37,081,407</b>	<b>1,982,787,504</b>	-	<b>324,525</b>	<b>671,650</b>	<b>2,691,112,158</b>	<b>15,834</b>	<b>10,496.33</b>
010: Non-PICS Pers Svc/Vacancy Factor	12,856,631	-	-	-	-	-	12,856,631	(1,675)	(1,441.18)
020: Phase In / Out Pgm & One-time Cost	30,574,620	1,689,011	(1,982,787,504)	-	(324,525)	-	(1,950,848,398)	(14,159)	(9,055.15)
030: Inflation & Price List Adjustments	2,123,420	206,225	117,254	-	-	-	2,446,899	-	-
<b>2013-15 Current Service Level</b>	<b>715,801,743</b>	<b>38,976,643</b>	<b>117,254</b>	-	-	<b>671,650</b>	<b>755,567,290</b>	-	-
<b>Adjusted 2013-15 Current Service Level</b>	<b>715,801,743</b>	<b>38,976,643</b>	<b>117,254</b>	-	-	<b>671,650</b>	<b>755,567,290</b>	-	-
<b>Total LFO Recommended Packages</b>	<b>(4,526,867)</b>	<b>(5,405,154)</b>	<b>(117,254)</b>	-	-	<b>(671,650)</b>	<b>(10,720,925)</b>	-	-
<b>2013-15 Legislative Actions</b>	<b>711,274,876</b>	<b>33,571,489</b>	-	-	-	-	<b>744,846,365</b>	-	-
Net change from 2011-13 Leg Approved Budget	43,010,323	10,584,736	(2,329,480,585)	-	(2,236,635,139)	(4,922,075)	(4,517,442,740)	(18,650)	(13,015.02)
Percent change from 2011-13 Leg Approved Budget	6.4%	46.0%	(100.0%)	0.0%	(100.0%)	(100.0%)	(85.8%)	(100.0%)	(100.0%)
Net change from 2013-15 Current Service Level	(4,526,867)	(5,405,154)	(117,254)	-	-	(671,650)	(10,720,925)	-	-
Percent change from 2013-15 Current Service Level	(0.6%)	(13.9%)	(100.0%)	0.0%	0.0%	(100.0%)	(1.4%)	0.0%	0.0%

LFO102 - Work Session Presentation Report  
2013-15 BienniumVersion: L - 01 - LFO Analyst Recommended  
Cross Reference: 58000-001-00-00-00000  
Public University Support

	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	Total Funds	Positions	Full-Time Equivalent (FTE)
<b>2011-13 Agy. Leg. Adopted</b>	<b>486,532,246</b>	-	<b>1,876,499,979</b>	-	<b>748,730,612</b>	-	<b>3,111,762,837</b>	<b>15,220</b>	<b>10,240.18</b>
2011-13 Ebds, SS & Admin Act	(11,550)	-	-	-	-	-	(11,550)	-	-
Ways & Means Actions	-	-	-	-	-	-	-	-	-
<b>2011-13 Leg Approved Budget</b>	<b>486,520,696</b>	-	<b>1,876,499,979</b>	-	<b>748,730,612</b>	-	<b>3,111,751,287</b>	<b>15,220</b>	<b>10,240.18</b>
<b>2011-13 Leg Approved Budget (Base)</b>	<b>486,520,696</b>	-	<b>1,876,499,979</b>	-	<b>748,730,612</b>	-	<b>3,111,751,287</b>	<b>15,220</b>	<b>10,240.18</b>
Summary of Base Adjustments	(1,163,358)	-	65,561,854	-	(748,730,612)	-	(684,332,116)	(2,600)	(2,344.07)
<b>2013-15 Base Budget</b>	<b>485,357,338</b>	-	<b>1,942,061,833</b>	-	-	-	<b>2,427,419,171</b>	<b>12,620</b>	<b>7,896.11</b>
010: Non-PICS Pers Svc/Vacancy Factor	10,484,540	-	-	-	-	-	10,484,540	-	-
020: Phase In / Out Pgm & One-time Cost	24,657,679	-	(1,942,061,833)	-	-	-	(1,917,404,154)	(12,620)	(7,896.11)
030: Inflation & Price List Adjustments	1,967,976	-	-	-	-	-	1,967,976	-	-
<b>2013-15 Current Service Level</b>	<b>522,467,533</b>	-	-	-	-	-	<b>522,467,533</b>	-	-
<b>Adjusted 2013-15 Current Service Level</b>	<b>522,467,533</b>	-	-	-	-	-	<b>522,467,533</b>	-	-
<b>Total LFO Recommended Packages</b>	<b>(39,566,021)</b>	-	-	-	-	-	<b>(39,566,021)</b>	-	-
<b>2013-15 Legislative Actions</b>	<b>482,901,512</b>	-	-	-	-	-	<b>482,901,512</b>	-	-
Net change from 2011-13 Leg Approved Budget	(3,619,184)	-	(1,876,499,979)	-	(748,730,612)	-	(2,628,849,775)	(15,220)	(10,240.18)
Percent change from 2011-13 Leg Approved Budget	(0.7%)	0.0%	(100.0%)	0.0%	(100.0%)	0.0%	(84.5%)	(100.0%)	(100.0%)
Net change from 2013-15 Current Service Level	(39,566,021)	-	-	-	-	-	(39,566,021)	-	-
Percent change from 2013-15 Current Service Level	(7.6%)	0.0%	0.0%	0.0%	0.0%	0.0%	(7.6%)	0.0%	0.0%

	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	Total Funds	Positions	Full-Time Equivalent (FTE)
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**Package 090 Analyst Adjustments**

Package Description This package is the Governor's recommended reduction in state support for the Chancellor's Office.

LFO Recommendation Approve

LFO Recommended	(1,513,543)	-	-	-	-	-	(1,513,543)	-	-
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	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	Total Funds	Positions	Full-Time Equivalent (FTE)
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**Package 810 LFO Analyst Adjustments**

Package Description This package moves General Fund support for specific programs operated by public universities to a new program area called State Programs. This structure will separate out General Fund support for programs with a statewide mission and programs with an industry specific focus where state support is matched, from state funding focused on general instruction and university administration, which will remain in the Public University Support program area.

LFO Recommendation Approve

LFO Recommended	(38,052,478)	-	-	-	-	-	(38,052,478)	-	-
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LFO102 - Work Session Presentation Report  
2013-15 Biennium

Version: L - 01 - LFO Analyst Recommended

Cross Reference: 58000-002-00-00-00000

Agricultural Experiment Station

	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	Total Funds	Positions	Full-Time Equivalent (FTE)
<b>2011-13 Agy. Leg. Adopted</b>	<b>51,793,494</b>	-	<b>10,721,598</b>	-	<b>66,309,362</b>	-	<b>128,824,454</b>	<b>746</b>	<b>583.33</b>
2011-13 Ebds, SS & Admin Act	-	-	-	-	-	-	-	-	-
Ways & Means Actions	-	-	-	-	-	-	-	-	-
<b>2011-13 Leg Approved Budget</b>	<b>51,793,494</b>	-	<b>10,721,598</b>	-	<b>66,309,362</b>	-	<b>128,824,454</b>	<b>746</b>	<b>583.33</b>
<b>2011-13 Leg Approved Budget (Base)</b>	<b>51,793,494</b>	-	<b>10,721,598</b>	-	<b>66,309,362</b>	-	<b>128,824,454</b>	<b>746</b>	<b>583.33</b>
Summary of Base Adjustments	(118,712)	-	161,416	-	(66,309,362)	-	(66,266,658)	(97)	(76.38)
<b>2013-15 Base Budget</b>	<b>51,674,782</b>	-	<b>10,883,014</b>	-	-	-	<b>62,557,796</b>	<b>649</b>	<b>506.95</b>
010: Non-PICS Pers Svc/Vacancy Factor	1,274,633	-	-	-	-	-	1,274,633	-	-
020: Phase In / Out Pgm & One-time Cost	1,850,814	-	(10,883,014)	-	-	-	(9,032,200)	(649)	(506.95)
030: Inflation & Price List Adjustments	87,123	-	-	-	-	-	87,123	-	-
<b>2013-15 Current Service Level</b>	<b>54,887,352</b>	-	-	-	-	-	<b>54,887,352</b>	-	-
<b>Adjusted 2013-15 Current Service Level</b>	<b>54,887,352</b>	-	-	-	-	-	<b>54,887,352</b>	-	-
<b>Total LFO Recommended Packages</b>	<b>287,930</b>	-	-	-	-	-	<b>287,930</b>	-	-
<b>2013-15 Legislative Actions</b>	<b>55,175,282</b>	-	-	-	-	-	<b>55,175,282</b>	-	-
Net change from 2011-13 Leg Approved Budget	3,381,788	-	(10,721,598)	-	(66,309,362)	-	(73,649,172)	(746)	(583.33)
Percent change from 2011-13 Leg Approved Budget	6.5%	0.0%	(100.0%)	0.0%	(100.0%)	0.0%	(57.2%)	(100.0%)	(100.0%)
Net change from 2013-15 Current Service Level	287,930	-	-	-	-	-	287,930	-	-
Percent change from 2013-15 Current Service Level	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%	0.0%



LFO102 - Work Session Presentation Report  
2013-15 Biennium

Version: L - 01 - LFO Analyst Recommended  
Cross Reference: 58000-002-00-00-00000  
Agricultural Experiment Station

	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	Total Funds	Positions	Full-Time Equivalent (FTE)
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**Package 810 LFO Analyst Adjustments**

Package Description This package provides additional General Fund support for the Statewide Public Service Programs operated by Oregon State University.

LFO Recommendation Approve

LFO Recommended	287,930	-	-	-	-	-	287,930	-	-
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LFO102 - Work Session Presentation Report  
2013-15 BienniumVersion: L - 01 - LFO Analyst Recommended  
Cross Reference: 58000-003-00-00-00000  
Extension Service

	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	Total Funds	Positions	Full-Time Equivalent (FTE)
<b>2011-13 Agy. Leg. Adopted</b>	<b>37,463,402</b>	-	<b>20,878,794</b>	-	<b>10,446,804</b>	-	<b>68,789,000</b>	<b>456</b>	<b>296.43</b>
2011-13 Ebds, SS & Admin Act	-	-	-	-	-	-	-	-	-
Ways & Means Actions	-	-	-	-	-	-	-	-	-
<b>2011-13 Leg Approved Budget</b>	<b>37,463,402</b>	-	<b>20,878,794</b>	-	<b>10,446,804</b>	-	<b>68,789,000</b>	<b>456</b>	<b>296.43</b>
<b>2011-13 Leg Approved Budget (Base)</b>	<b>37,463,402</b>	-	<b>20,878,794</b>	-	<b>10,446,804</b>	-	<b>68,789,000</b>	<b>456</b>	<b>296.43</b>
Summary of Base Adjustments	(90,120)	-	744,363	-	(10,446,804)	-	(9,792,561)	(99)	(81.24)
<b>2013-15 Base Budget</b>	<b>37,373,282</b>	-	<b>21,623,157</b>	-	-	-	<b>58,996,439</b>	<b>357</b>	<b>215.19</b>
010: Non-PICS Pers Svc/Vacancy Factor	953,190	-	-	-	-	-	953,190	-	-
020: Phase In / Out Pgm & One-time Cost	1,338,709	-	(21,623,157)	-	-	-	(20,284,448)	(357)	(215.19)
030: Inflation & Price List Adjustments	36,052	-	-	-	-	-	36,052	-	-
<b>2013-15 Current Service Level</b>	<b>39,701,233</b>	-	-	-	-	-	<b>39,701,233</b>	-	-
<b>Adjusted 2013-15 Current Service Level</b>	<b>39,701,233</b>	-	-	-	-	-	<b>39,701,233</b>	-	-
<b>Total LFO Recommended Packages</b>	<b>208,293</b>	-	-	-	-	-	<b>208,293</b>	-	-
<b>2013-15 Legislative Actions</b>	<b>39,909,526</b>	-	-	-	-	-	<b>39,909,526</b>	-	-
Net change from 2011-13 Leg Approved Budget	2,446,124	-	(20,878,794)	-	(10,446,804)	-	(28,879,474)	(456)	(296.43)
Percent change from 2011-13 Leg Approved Budget	6.5%	0.0%	(100.0%)	0.0%	(100.0%)	0.0%	(42.0%)	(100.0%)	(100.0%)
Net change from 2013-15 Current Service Level	208,293	-	-	-	-	-	208,293	-	-
Percent change from 2013-15 Current Service Level	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%	0.0%

	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	Total Funds	Positions	Full-Time Equivalent (FTE)
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**Package 810 LFO Analyst Adjustments**

Package Description This package provides additional General Fund support for the Statewide Public Service Programs operated by Oregon State University.

LFO Recommendation Approve

LFO Recommended	208,293	-	-	-	-	-	208,293	-	-
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LFO102 - Work Session Presentation Report  
2013-15 Biennium

Version: L - 01 - LFO Analyst Recommended

Cross Reference: 58000-004-00-00-00000

Forest Research Laboratory

	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	Total Funds	Positions	Full-Time Equivalent (FTE)
<b>2011-13 Agy. Leg. Adopted</b>	<b>5,698,684</b>	-	<b>7,936,326</b>	-	<b>23,854,701</b>	-	<b>37,489,711</b>	<b>215</b>	<b>172.37</b>
2011-13 Ebds, SS & Admin Act	-	-	-	-	-	-	-	-	-
Ways & Means Actions	-	-	-	-	-	-	-	-	-
<b>2011-13 Leg Approved Budget</b>	<b>5,698,684</b>	-	<b>7,936,326</b>	-	<b>23,854,701</b>	-	<b>37,489,711</b>	<b>215</b>	<b>172.37</b>
<b>2011-13 Leg Approved Budget (Base)</b>	<b>5,698,684</b>	-	<b>7,936,326</b>	-	<b>23,854,701</b>	-	<b>37,489,711</b>	<b>215</b>	<b>172.37</b>
Summary of Base Adjustments	(13,372)	-	283,174	-	(23,854,701)	-	(23,584,899)	(20)	(17.00)
<b>2013-15 Base Budget</b>	<b>5,685,312</b>	-	<b>8,219,500</b>	-	-	-	<b>13,904,812</b>	<b>195</b>	<b>155.37</b>
010: Non-PICS Pers Svc/Vacancy Factor	144,268	-	-	-	-	-	144,268	-	-
020: Phase In / Out Pgm & One-time Cost	203,598	-	(8,219,500)	-	-	-	(8,015,902)	(195)	(155.37)
030: Inflation & Price List Adjustments	5,874	-	-	-	-	-	5,874	-	-
<b>2013-15 Current Service Level</b>	<b>6,039,052</b>	-	-	-	-	-	<b>6,039,052</b>	-	-
<b>Adjusted 2013-15 Current Service Level</b>	<b>6,039,052</b>	-	-	-	-	-	<b>6,039,052</b>	-	-
<b>Total LFO Recommended Packages</b>	<b>31,720</b>	-	-	-	-	-	<b>31,720</b>	-	-
<b>2013-15 Legislative Actions</b>	<b>6,070,772</b>	-	-	-	-	-	<b>6,070,772</b>	-	-
Net change from 2011-13 Leg Approved Budget	372,088	-	(7,936,326)	-	(23,854,701)	-	(31,418,939)	(215)	(172.37)
Percent change from 2011-13 Leg Approved Budget	6.5%	0.0%	(100.0%)	0.0%	(100.0%)	0.0%	(83.8%)	(100.0%)	(100.0%)
Net change from 2013-15 Current Service Level	31,720	-	-	-	-	-	31,720	-	-
Percent change from 2013-15 Current Service Level	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%	0.0%

	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	Total Funds	Positions	Full-Time Equivalent (FTE)
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**Package 810 LFO Analyst Adjustments**

Package Description This package provides additional General Fund support for the Statewide Public Service Programs operated by Oregon State University.

LFO Recommendation Approve

LFO Recommended	31,720	-	-	-	-	-	31,720	-	-
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	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	Total Funds	Positions	Full-Time Equivalent (FTE)
<b>2011-13 Agy. Leg. Adopted</b>	-	-	-	-	-	-	-	-	-
2011-13 Ebds, SS & Admin Act	-	-	-	-	-	-	-	-	-
Ways & Means Actions	-	-	-	-	-	-	-	-	-
<b>2011-13 Leg Approved Budget</b>	-	-	-	-	-	-	-	-	-
<b>2011-13 Leg Approved Budget (Base)</b>	-	-	-	-	-	-	-	-	-
Summary of Base Adjustments	-	-	-	-	-	-	-	-	-
<b>2013-15 Base Budget</b>	-	-	-	-	-	-	-	-	-
<b>2013-15 Current Service Level</b>	-	-	-	-	-	-	-	-	-
<b>Adjusted 2013-15 Current Service Level</b>	-	-	-	-	-	-	-	-	-
<b>Total LFO Recommended Packages</b>	<b>38,052,478</b>	-	-	-	-	-	<b>38,052,478</b>	-	-
<b>2013-15 Legislative Actions</b>	<b>38,052,478</b>	-	-	-	-	-	<b>38,052,478</b>	-	-
Net change from 2011-13 Leg Approved Budget	38,052,478	-	-	-	-	-	38,052,478	-	-
Percent change from 2011-13 Leg Approved Budget	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%	0.0%	0.0%
Net change from 2013-15 Current Service Level	38,052,478	-	-	-	-	-	38,052,478	-	-
Percent change from 2013-15 Current Service Level	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%	0.0%	0.0%

	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	Total Funds	Positions	Full-Time Equivalent (FTE)
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**Package 810 LFO Analyst Adjustments**

Package Description This package moves General Fund support for state programs operated by public universities to a new program area called State Programs. The following amounts are recommended for State Programs:

- ETIC.....\$29,030,827
- Dispute Resolution.....\$2,435,769
- Oregon Solutions.....\$2,185,335
- Signature Research Centers.....\$1,007,335
- Oregon Metals Initiative.....\$725,136
- Industry Partnerships.....\$643,049
- Labor Education Research Center...\$576,867
- Population Research Center.....\$421,407
- Natural Resources Institute.....\$386,353
- Clinical Legal Education.....\$337,557
- Climate Research.....\$302,843

LFO Recommendation Approve

<b>LFO Recommended</b>	<b>38,052,478</b>	-	-	-	-	-	<b>38,052,478</b>	-	-
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LFO102 - Work Session Presentation Report  
2013-15 BienniumVersion: L - 01 - LFO Analyst Recommended  
Cross Reference: 58000-013-00-00-00000  
Debt Service

	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	Total Funds	Positions	Full-Time Equivalent (FTE)
<b>2011-13 Agy. Leg. Adopted</b>	<b>87,681,177</b>	<b>14,133,456</b>	<b>30,443,533</b>	-	<b>187,625,632</b>	<b>4,922,075</b>	<b>324,805,873</b>	-	-
2011-13 Ebds, SS & Admin Act	(892,900)	260,577	344,054	-	3,682,440	-	3,394,171	-	-
Ways & Means Actions	-	-	-	-	-	-	-	-	-
<b>2011-13 Leg Approved Budget</b>	<b>86,788,277</b>	<b>14,394,033</b>	<b>30,787,587</b>	-	<b>191,308,072</b>	<b>4,922,075</b>	<b>328,200,044</b>	-	-
<b>2011-13 Leg Approved Budget (Base)</b>	<b>86,788,277</b>	<b>14,394,033</b>	<b>23,885,391</b>	-	<b>194,527,828</b>	<b>4,922,075</b>	<b>324,517,604</b>	-	-
Summary of Base Adjustments	3,368,081	14,094,654	(23,885,391)	-	(194,203,303)	(4,250,425)	(204,876,384)	-	-
<b>2013-15 Base Budget</b>	<b>90,156,358</b>	<b>28,488,687</b>	-	-	<b>324,525</b>	<b>671,650</b>	<b>119,641,220</b>	-	-
020: Phase In / Out Pgm & One-time Cost	2,523,820	-	-	-	(324,525)	-	2,199,295	-	-
030: Inflation & Price List Adjustments	26,395	-	117,254	-	-	-	143,649	-	-
<b>2013-15 Current Service Level</b>	<b>92,706,573</b>	<b>28,488,687</b>	<b>117,254</b>	-	-	<b>671,650</b>	<b>121,984,164</b>	-	-
<b>Adjusted 2013-15 Current Service Level</b>	<b>92,706,573</b>	<b>28,488,687</b>	<b>117,254</b>	-	-	<b>671,650</b>	<b>121,984,164</b>	-	-
<b>Total LFO Recommended Packages</b>	<b>(3,541,267)</b>	<b>(2,917,198)</b>	<b>(117,254)</b>	-	-	<b>(671,650)</b>	<b>(7,247,369)</b>	-	-
<b>2013-15 Legislative Actions</b>	<b>89,165,306</b>	<b>25,571,489</b>	-	-	-	-	<b>114,736,795</b>	-	-
Net change from 2011-13 Leg Approved Budget	2,377,029	11,177,456	(30,787,587)	-	(191,308,072)	(4,922,075)	(213,463,249)	-	-
Percent change from 2011-13 Leg Approved Budget	2.7%	77.7%	(100.0%)	0.0%	(100.0%)	(100.0%)	(65.0%)	0.0%	0.0%
Net change from 2013-15 Current Service Level	(3,541,267)	(2,917,198)	(117,254)	-	-	(671,650)	(7,247,369)	-	-
Percent change from 2013-15 Current Service Level	(3.8%)	(10.2%)	(100.0%)	0.0%	0.0%	(100.0%)	(5.9%)	0.0%	0.0%



	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	Total Funds	Positions	Full-Time Equivalent (FTE)
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**Package 810 LFO Analyst Adjustments**

Package Description This package adjusts state supported debt service payments to reflect payments required in 2013-15. Other Funds and Federal Funds are removed because OUS is no longer subject to expenditure limitations on these types of funds.

LFO Recommendation Approve

LFO Recommended	(3,541,267)	(2,917,198)	(117,254)	-	-	(671,650)	(7,247,369)	-	-
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LFO102 - Work Session Presentation Report  
2013-15 BienniumVersion: L - 01 - LFO Analyst Recommended  
Cross Reference: 58000-016-00-00-00000  
Sports Action Lottery

	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	Total Funds	Positions	Full-Time Equivalent (FTE)
<b>2011-13 Agy. Leg. Adopted</b>	-	8,825,680	-	-	-	-	8,825,680	-	-
2011-13 Ebds, SS & Admin Act	-	(232,960)	-	-	-	-	(232,960)	-	-
Ways & Means Actions	-	-	-	-	-	-	-	-	-
<b>2011-13 Leg Approved Budget</b>	-	8,592,720	-	-	-	-	8,592,720	-	-
<b>2011-13 Leg Approved Budget (Base)</b>	-	8,592,720	-	-	-	-	8,592,720	-	-
Summary of Base Adjustments	-	-	-	-	-	-	-	-	-
<b>2013-15 Base Budget</b>	-	8,592,720	-	-	-	-	8,592,720	-	-
020: Phase In / Out Pgm & One-time Cost	-	1,689,011	-	-	-	-	1,689,011	-	-
030: Inflation & Price List Adjustments	-	206,225	-	-	-	-	206,225	-	-
<b>2013-15 Current Service Level</b>	-	10,487,956	-	-	-	-	10,487,956	-	-
<b>Adjusted 2013-15 Current Service Level</b>	-	10,487,956	-	-	-	-	10,487,956	-	-
<b>Total LFO Recommended Packages</b>	-	(2,487,956)	-	-	-	-	(2,487,956)	-	-
<b>2013-15 Legislative Actions</b>	-	8,000,000	-	-	-	-	8,000,000	-	-
Net change from 2011-13 Leg Approved Budget	-	(592,720)	-	-	-	-	(592,720)	-	-
Percent change from 2011-13 Leg Approved Budget	0.0%	(6.9%)	0.0%	0.0%	0.0%	0.0%	(6.9%)	0.0%	0.0%
Net change from 2013-15 Current Service Level	-	(2,487,956)	-	-	-	-	(2,487,956)	-	-
Percent change from 2013-15 Current Service Level	0.0%	(23.7%)	0.0%	0.0%	0.0%	0.0%	(23.7%)	0.0%	0.0%

	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	Total Funds	Positions	Full-Time Equivalent (FTE)
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**Package 810 LFO Analyst Adjustments**

Package Description This package represents a policy decision to cap Sports Action Lottery payments at \$8 million for the 2013-15 biennium, with the University of Oregon and Oregon State University limited to receiving a maximum of \$1 million each.

By statute, OUS receives one percent of Lottery Funds deposited into the Department of Administration Services Economic Development Fund, which is transferred to the Sports Action account to finance intercollegiate athletics and graduate student scholarships. The Board of Higher Education determines allocation among the campuses.

LFO Recommendation Approve

LFO Recommended	-	(2,487,956)	-	-	-	-	(2,487,956)	-	-
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## Legislatively Proposed 2013-2015 Key Performance Measures

**Agency: OREGON UNIVERSITY SYSTEM**

Mission: The Legislative Assembly declares that the mission of all higher education in Oregon is to: 1) Enable students to extend prior educational experiences in order to reach their full potential as participating and contributing citizens by helping them develop scientific, professional, and technological expertise, together with heightened intellectual, cultural, and humane sensitivities and a sense of purpose; 2) Create, collect, evaluate, store, and pass on the body of knowledge necessary to educate future generations; 3) Provide appropriate instructional, research, and public service programs to enrich the cultural life of Oregon and to support and maintain a healthy state economy.

Legislatively Proposed KPMs	Customer Service Category	Agency Request	Most Current Result	Target 2014	Target 2015
1 - COST MINUS GRANT AID AS A PERCENT OF INCOME - Cost of attendance at OUS for a resident undergraduate (tuition & fees, room & board, other expenses) minus grant aid as a percent of median income.		Approved KPM	28.60	28.00	28.00
2 - FIRST-TIME FRESHMEN - Number of entering first-time freshmen.		Approved KPM	11,507.00	11,811.00	11,811.00
3 - COMMUNITY COLLEGE TRANSFERS - Number of students who are new Oregon community college transfers.		Approved KPM	5,125.00	5,125.00	5,125.00
4 - FRESHMAN PARTICIPATION - Oregon freshman participation rate in OUS institutions.		Approved KPM	20.00	20.00	20.00
5 - PERSISTENCE - Percent of full-time freshmen who demonstrate progress by returning for the second year.		Approved KPM	82.00	82.00	82.00
6 - COMPLETION - Percent of full-time freshmen starting and completing a bachelor's degree at an OUS university (6-year graduation rate).		Approved KPM	59.80	60.30	60.30
7 - TRANSFER STUDENT COMPLETION - Percent of college transfers completing a bachelor's degree at an OUS university (4-year graduation rate).		Approved KPM	71.90	71.00	71.00
8 - TIME TO DEGREE - Average time to degree for students entering as full-time freshmen (years).		Approved KPM	4.58	4.50	4.50
9 - TRANSFER STUDENT TIME TO DEGREE - Average time to degree for community college transfers (years).		Approved KPM	2.69	2.60	2.60
10 - GRADUATE SATISFACTION - Average rating of overall quality of experience by recent OUS bachelor's graduates (5-pt scale)		Approved KPM	4.20		4.20
11 - STUDENT/FACULTY RATIO - Ratio of students to full-time faculty.		Approved KPM	26.80	25.00	25.00

**Agency: OREGON UNIVERSITY SYSTEM**

Mission: The Legislative Assembly declares that the mission of all higher education in Oregon is to: 1) Enable students to extend prior educational experiences in order to reach their full potential as participating and contributing citizens by helping them develop scientific, professional, and technological expertise, together with heightened intellectual, cultural, and humane sensitivities and a sense of purpose; 2) Create, collect, evaluate, store, and pass on the body of knowledge necessary to educate future generations; 3) Provide appropriate instructional, research, and public service programs to enrich the cultural life of Oregon and to support and maintain a healthy state economy.

Legislatively Proposed KPMs	Customer Service Category	Agency Request	Most Current Result	Target 2014	Target 2015
12 - INTERNSHIPS - Percent of bachelor's graduates completing an OUS-approved internship.		Approved KPM	90.00		90.00
13 - GRADUATE SUCCESS - Percent of graduates employed and/or continuing education.		Approved KPM	92.00		90.00
14 - EMPLOYED IN OREGON - Percent of employed graduates working in Oregon.		Approved KPM	76.00		80.00
15 - BACHELOR'S DEGREES - Total number of bachelor's degrees granted.		Approved KPM	13,926.00	15,970.00	16,100.00
16 - ADVANCED DEGREES - Total number of advanced degrees granted (master's, doctoral, and professional).		Approved KPM	4,768.00	4,800.00	4,800.00
17 - ENGINEERING AND COMPUTER SCIENCE DEGREES - Total number of degrees granted in engineering and computer sciences (all levels; includes multiple majors).		Approved KPM	1,641.00	1,700.00	1,700.00
18 - SPONSORED RESEARCH - Total sponsored research and development dollars supported by external fund sources (\$ in millions) a) Total, b) Federal sources, c) Private sources.		Approved KPM	418.40	397.00	375.00
19 - RESEARCH DOLLARS PER FACULTY - Sponsored research dollars per faculty at research/doctoral universities - OSU, PSU, UO (\$ in thousands).		Approved KPM	167.80	159.00	151.00
20 - Philanthropy - Total gifts from philanthropic sources (\$ in millions). A) Total, B) Capital Projects, C) Faculty Support (including chairs), D) Scholarships, E) Other.		Approved KPM	128.00	120.00	130.00
21 - STATEWIDE PUBLIC SERVICES EXTERNAL FUNDS - External funds generated per state dollar invested in Statewide Public Services (SWPS).		Approved KPM	2.14	1.95	2.00
22 - CUSTOMER SERVICE - Percent of customers rating their satisfaction with the agency's customer service as "good" or "excellent": overall, timeliness, accuracy, helpfulness, expertise, availability of information.		Approved KPM	87.40	87.00	87.00

**Agency: OREGON UNIVERSITY SYSTEM**

Mission: The Legislative Assembly declares that the mission of all higher education in Oregon is to: 1) Enable students to extend prior educational experiences in order to reach their full potential as participating and contributing citizens by helping them develop scientific, professional, and technological expertise, together with heightened intellectual, cultural, and humane sensitivities and a sense of purpose; 2) Create, collect, evaluate, store, and pass on the body of knowledge necessary to educate future generations; 3) Provide appropriate instructional, research, and public service programs to enrich the cultural life of Oregon and to support and maintain a healthy state economy.

Legislatively Proposed KPMs	Customer Service Category	Agency Request	Most Current Result	Target 2014	Target 2015
22 - CUSTOMER SERVICE - Percent of customers rating their satisfaction with the agency's customer service as "good" or "excellent": overall, timeliness, accuracy, helpfulness, expertise, availability of information.	Accuracy	Approved KPM	84.70	87.00	87.00
22 - CUSTOMER SERVICE - Percent of customers rating their satisfaction with the agency's customer service as "good" or "excellent": overall, timeliness, accuracy, helpfulness, expertise, availability of information.	Availability of Information	Approved KPM	82.80	87.00	87.00
22 - CUSTOMER SERVICE - Percent of customers rating their satisfaction with the agency's customer service as "good" or "excellent": overall, timeliness, accuracy, helpfulness, expertise, availability of information.	Expertise	Approved KPM	90.40	87.00	87.00
22 - CUSTOMER SERVICE - Percent of customers rating their satisfaction with the agency's customer service as "good" or "excellent": overall, timeliness, accuracy, helpfulness, expertise, availability of information.	Helpfulness	Approved KPM	86.40	87.00	87.00
22 - CUSTOMER SERVICE - Percent of customers rating their satisfaction with the agency's customer service as "good" or "excellent": overall, timeliness, accuracy, helpfulness, expertise, availability of information.	Overall	Approved KPM	86.60	87.00	87.00
22 - CUSTOMER SERVICE - Percent of customers rating their satisfaction with the agency's customer service as "good" or "excellent": overall, timeliness, accuracy, helpfulness, expertise, availability of information.	Timeliness	Approved KPM	86.10	87.00	87.00
23 - Boards and Commissions Best Practices: Percent of total best practices met by the Board.		Approved KPM	100.00	100.00	100.00

**LFO Recommendation:**

Approve the proposed Key Performance Measures for the Oregon University System.

**Sub-Committee Action:**