Oregon University System

OUS PRESENTATION TO THE JOINT COMMITTEE ON WAYS AND MEANS, SUBCOMMITTEE ON EDUCATION

TABLE OF CONTENTS: WRITTEN MATERIALS

Oregon University System

OUS POWERPOINT PRESENATION: BACKGROUND DOCUMENTS

Wednesday, March 20, 2013

Contributing to Oregon's Vitality

Oregon University System

Dr. Melody Rose, Chancellor, Oregon University System
Dr. Emily Plec, Director, Oregon State Board of Higher Education; Professor of Communication Studies, Western Oregon University

Joint Committee on Ways and Means, Subcommittee on Education, March 20, 2013

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A Decade of Results and Transformation

- A hub for collaborations
- Creating a seamless student experience, degrees
- Meeting the demands of Oregon's economy

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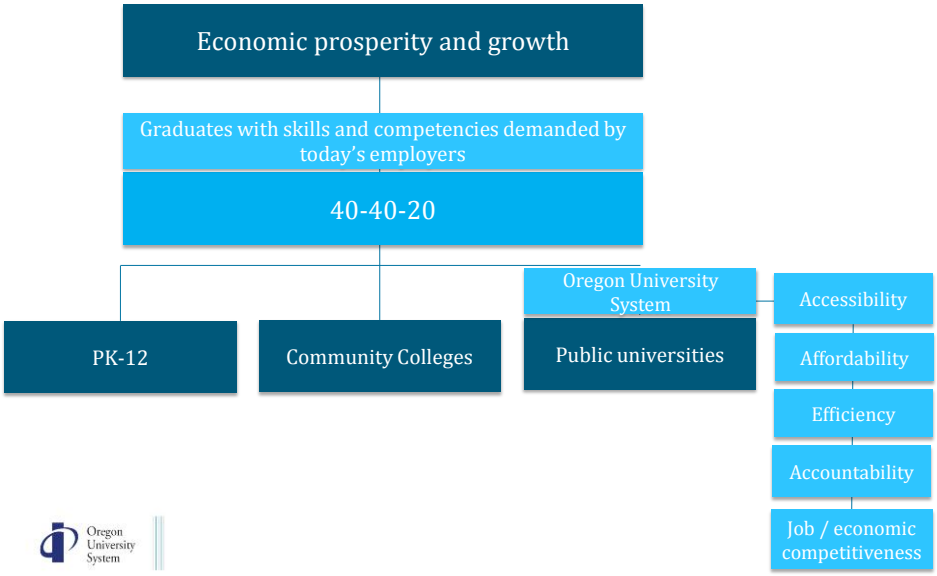
OUS: achieving 40-40-20, together



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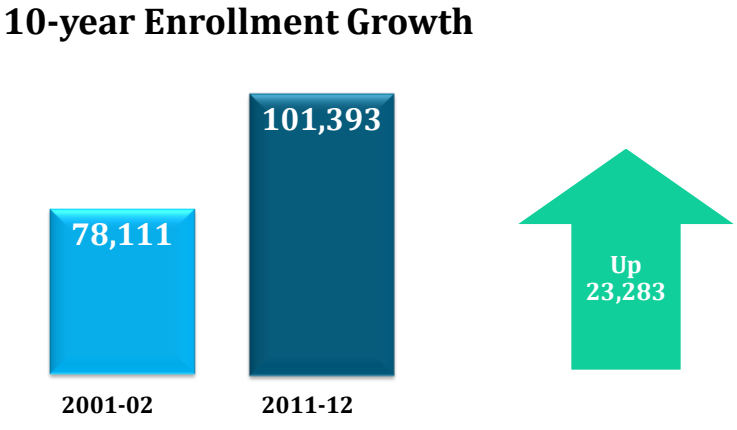
Enrolling more students to meet demand



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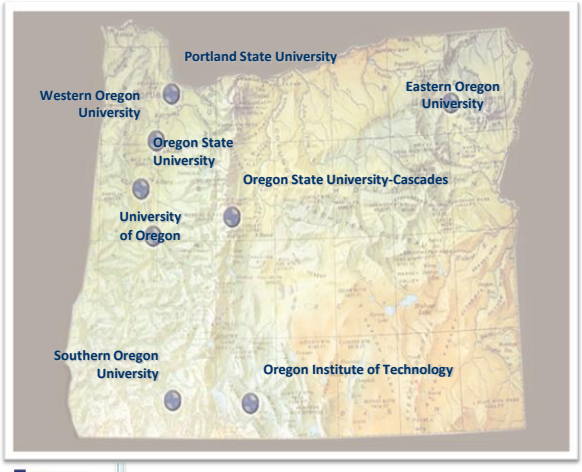
We've grown faster than any other state



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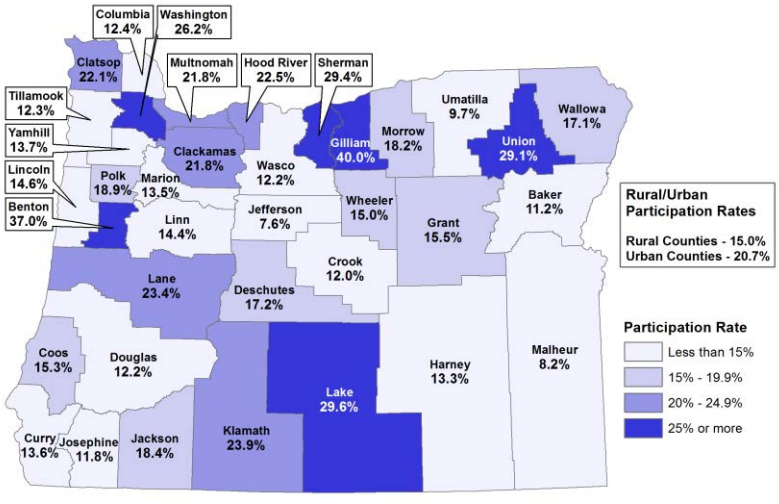
Highest 5-year postsecondary enrollment growth increase (%) in the U.S.
(SHEEO)

Rural student success: critical to Oregon's economy

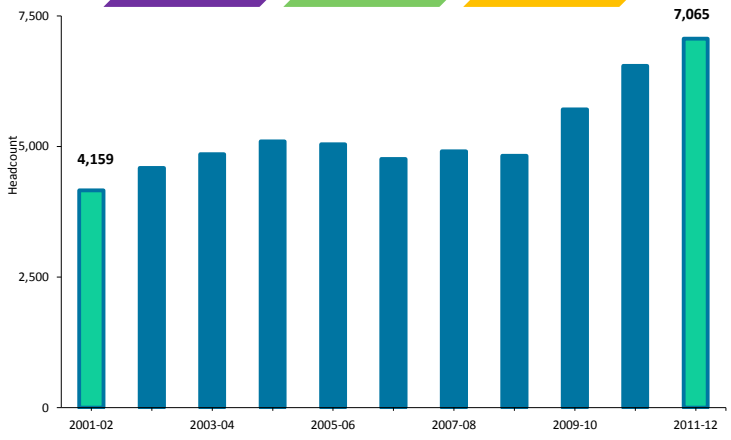


OUS Freshman Participation Rate 2011-12 as a Percentage of Oregon Public High School Graduates, 2010-11

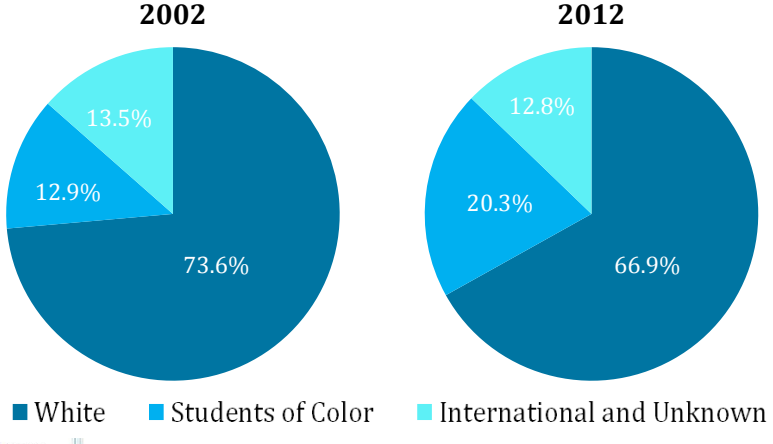
Source: OUS Institutional Research; Excludes home school completers and private high school graduates.

Undergraduate Community College Transfers Academic Years 2001-02 through 2011-12

Demand → Economy → Workforce



Serving a more diverse student body than ever



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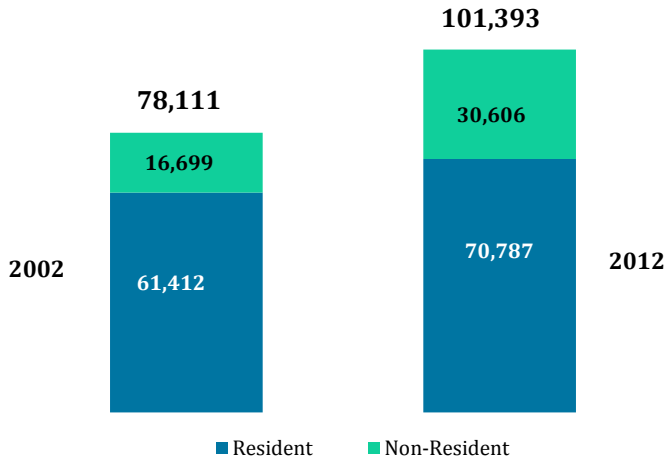
Non-residents' enrollment growth helps support Oregon students



More global diversity than ever

2002 International Students: 4,182

2012 International Students: 7,543

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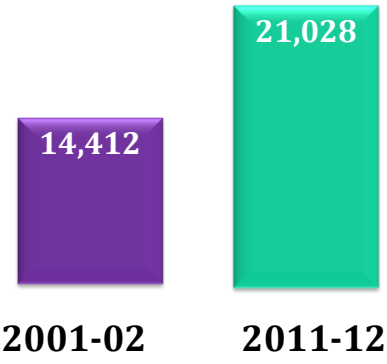
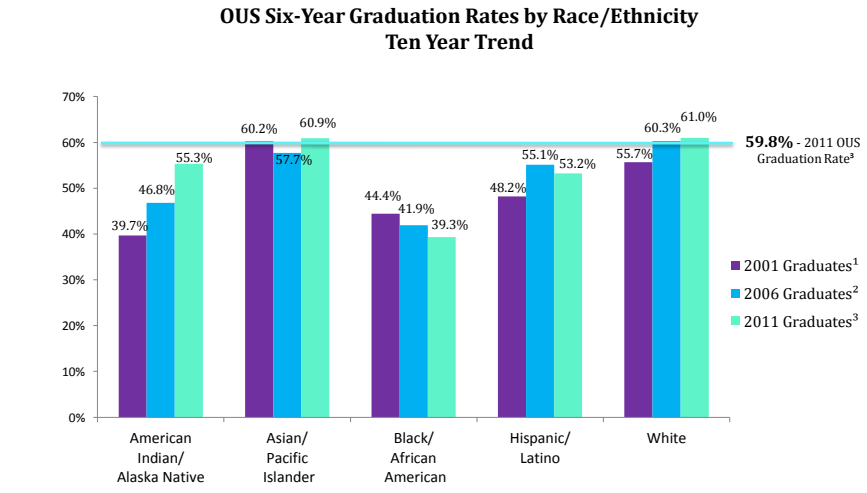
More degrees than ever, aligned with workforce needs

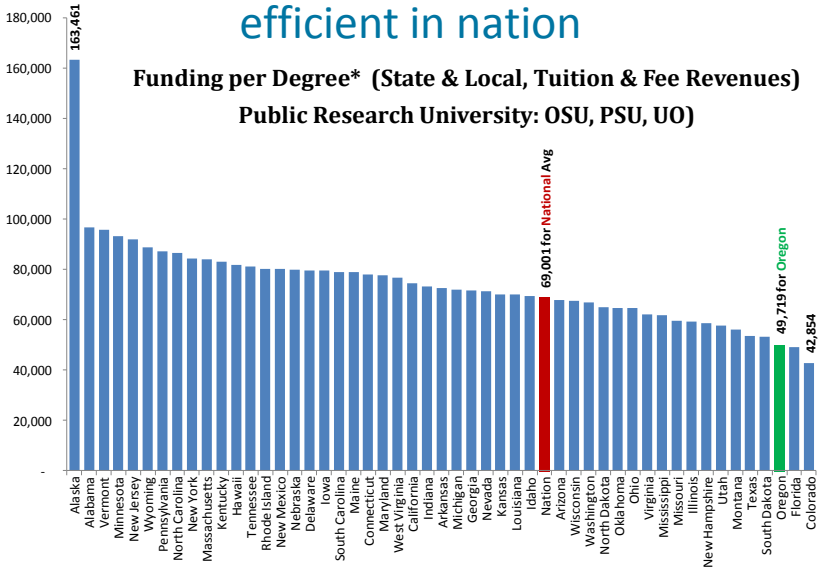


Focus: Increasing outcomes to ensure degree equity



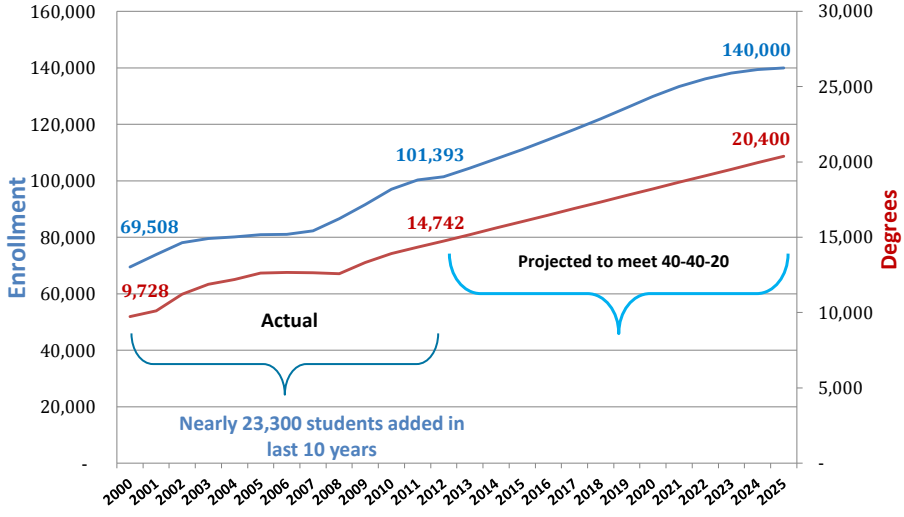
¹1995-96 Fall First-Time Freshman Cohort completing by June 2001
²2000-01 Fall First-Time Freshman Cohort completing by June 2006
³2005-06 Fall First-Time Freshman Cohort completing by June 2011
Source: OUS Institutional Research

Cost per degree among lowest, most efficient in nation



Source: NCES, IPEDS Completions and Finance Surveys (2007-08)

OUS Fall Term Headcount Enrollment And Bachelor's Degrees Actual Through 2012 Projected To Meet 40-40-20 Goals



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OUS is driving down costs with innovation

- **Online degree** mapping
- **Optimum facilities use**
- **New interdisciplinary majors**
- **Increased on-line, gateway courses, summer session**
- **More CC transfer programs**
- **Significantly greater faculty workloads**

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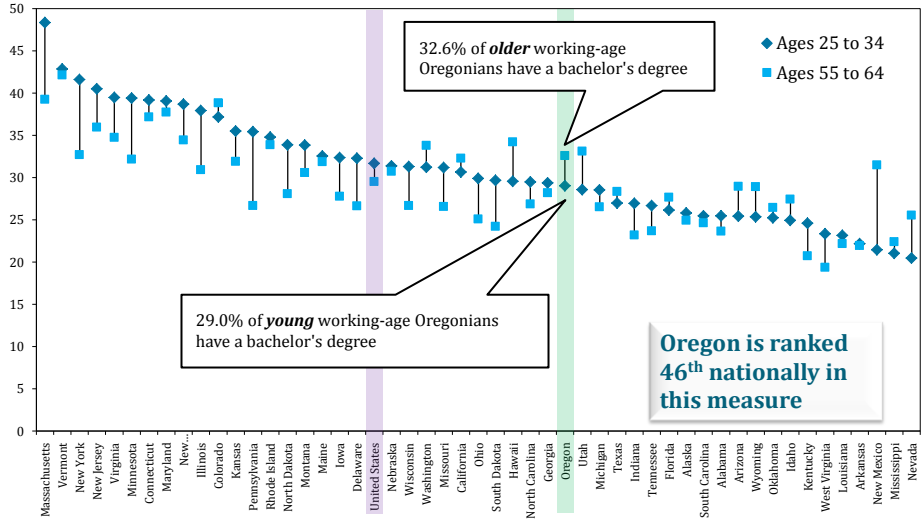
Succession planning for our workforce



Source: U.S. Census Bureau, 2011 ACS

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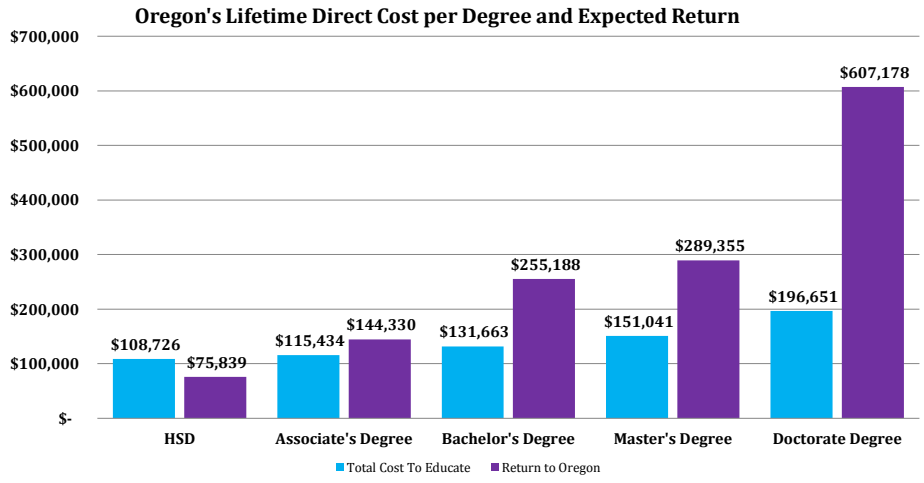
More Education = Returns to Oregon



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Workforce and Economic Prosperity, Competitiveness

"Education attainment levels, in combination with other ingredients such as livability, public infrastructure, entrepreneurial spirit and quality of education, together lead to economic growth."

-- Tom Potiowsky, former state economist, chair of Economics Dept, PSU @ the OUS 40-40-20 Symposium

Higher education: our future depends on it

Statewide focus on student needs, challenges, innovation, collaboration, economy, accountability

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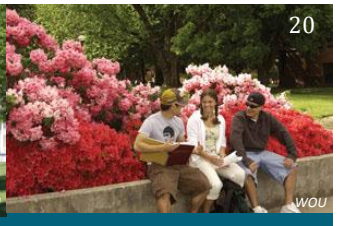

Diverse Missions of OUS Institutions

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Dr. Mike Gottfredson, President, University of Oregon
Dr. Bob Davies, President, Eastern Oregon University

Joint Committee on Ways and Means, Subcommittee on Education, March 20, 2013

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Education Innovation and Leadership

Oregon University System

Dr. Karen Marrongelle, Assistant Vice Chancellor for Academic Standards and Collaborations, Oregon University System
Dr. Mary Cullinan, President, Southern Oregon University

Joint Committee on Ways and Means, Subcommittee on Education, March 20, 2013

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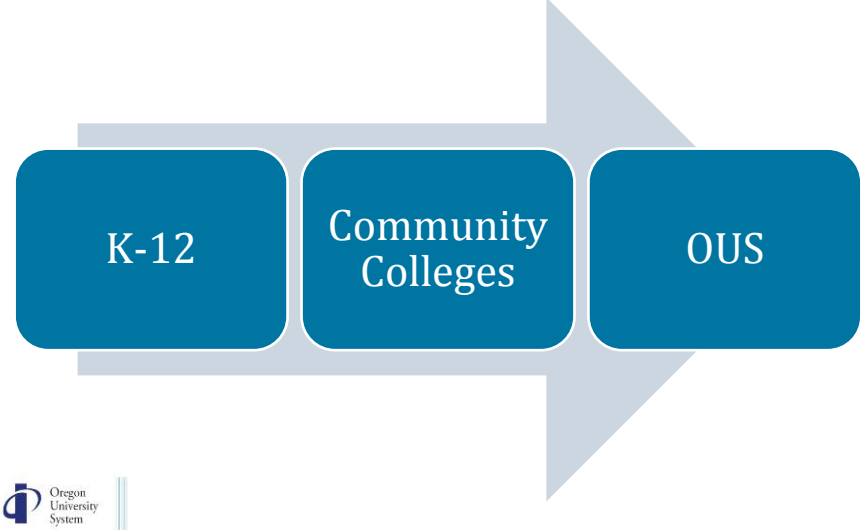
Collaborations increase student success



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The Nation Looks to Oregon's Solutions

- Oregon's standards for Dual Credit shaped the national standards for Dual Credit programs (NACEP Standards)
- OUS has a history of working with the community colleges to develop innovative solutions to improve student transfer. Examples:
  - Oregon Transfer Module, Transfer Degrees
  - General Education Learning Outcomes

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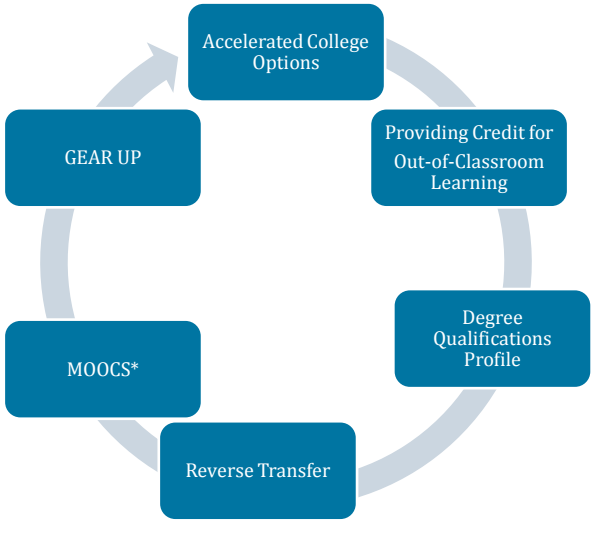
Source: Knocking at the College Door, Projections of High School Graduates, 2012, WICHE.

Innovating to lower students' costs, improve time-to-degree, and ensure quality



*Massively Open On-line Courses

Oregon University System

SOUTHERN OREGON UNIVERSITY

Mandee Light and **Beatriz Abella**
Current students

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SOUTHERN OREGON UNIVERSITY

Jared Rennie ’99, ’00
Majors: Spanish + International Studies, Master of Arts in Teaching

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SOUTHERN OREGON UNIVERSITY

Monica Alfaro ’10
Major: Criminal Justice

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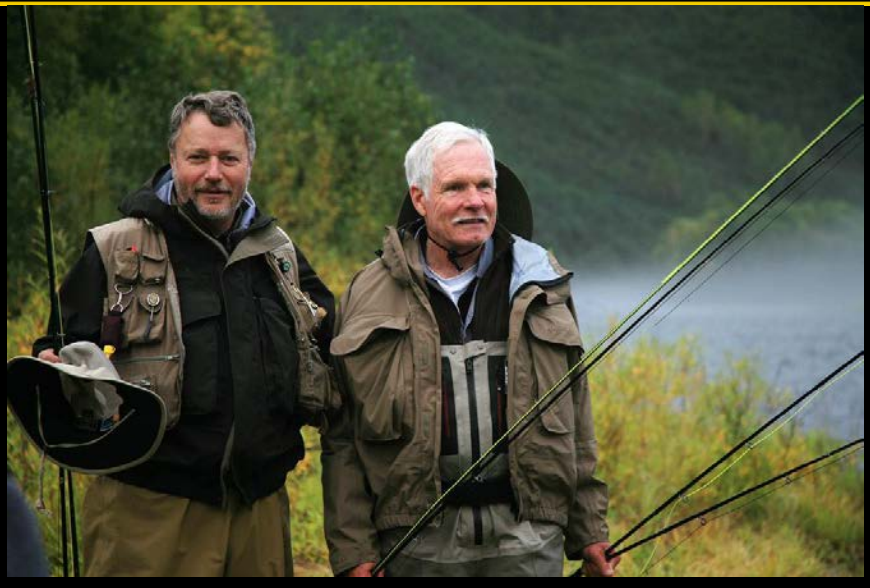
SOUTHERN OREGON UNIVERSITY



Michael Finley ’70
Major: Biology, Distinguished Alumnus 1991

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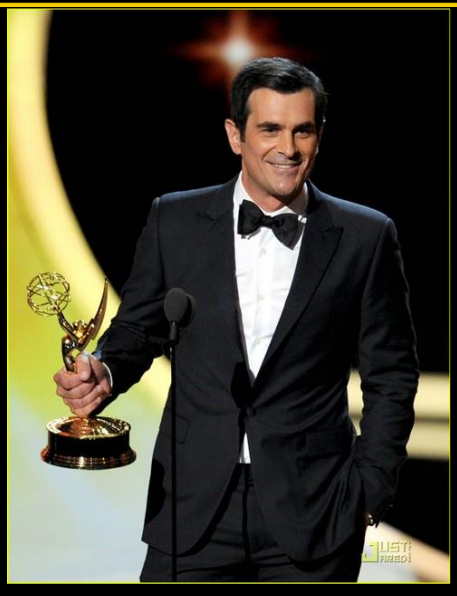
SOUTHERN OREGON UNIVERSITY



Ty Burrell '93
Major: Theatre Arts

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OUS Operating Budget: Driving Outcomes

Oregon University System

Dr. Jay Kenton, Vice Chancellor for Finance and Administration
Oregon University System

Joint Committee on Ways and Means, Subcommittee on Education, March 21, 2013

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2011-2013 Budget Notes

Operating Budget – SB 5532:

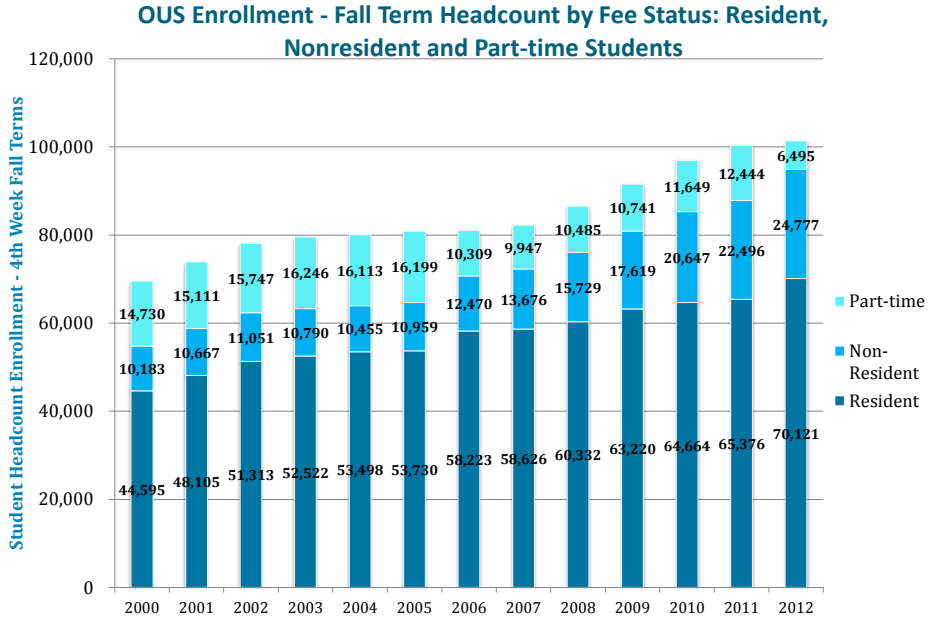
Tuition limits

- For OIT, OSU, PSU, and UO:
  - 8.0% average for biennium, no more than 9% in any either year
- For EOU, SOU, and WOU:
  - 6.5% average for biennium, no more than 7.5% in either year
- Status report: complied with these directives

Reductions in compensation

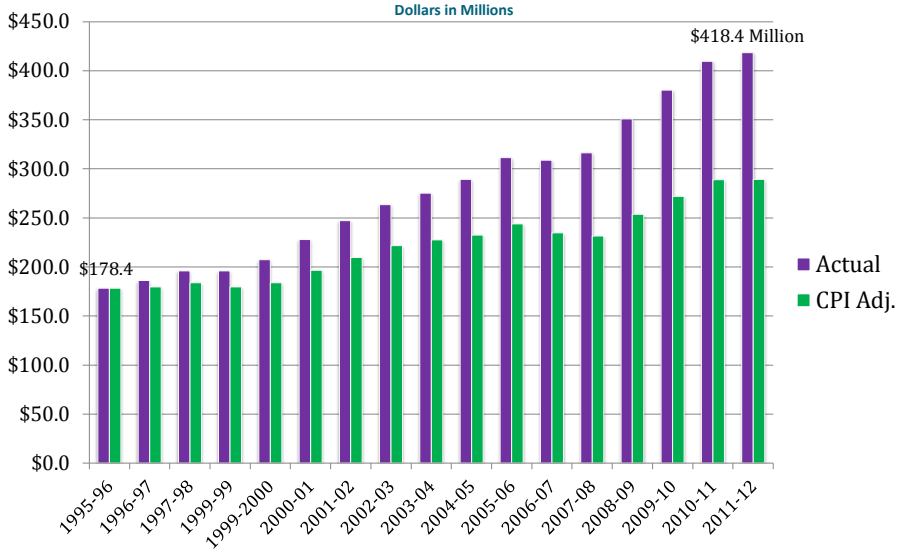
- If **reductions in compensation** are necessary, total compensation for staff and/or faculty should be similar to that for administrators and front-line staff
- Status report: compiled with this directive

Oregon University System



OUS Research and Sponsored Projects 1996-2012

Dollars in Millions



Oregon University System – Budget Comparisons

	2011-13 LAB	2013-15 CSL (Post SB 242 Calculation)	2013-15 GBB	2013-15 Co-Chairs Budget
General Funds				
Education & General	$486,520,696	$522,467,533	$520,953,990	$520,953,990
Agriculture Experiment Station	51,793,494	54,887,352	51,793,494	54,887,352
Extension Service	37,463,402	39,701,233	37,463,402	39,701,233
Forest Research Laboratory	5,698,684	6,039,052	5,698,684	6,039,052
SWPS Subtotal	94,955,580	100,627,637	94,955,580	100,627,637
Subtotal Operations	581,476,276	623,095,170	615,909,570	621,581,627
Debt Service	86,788,277	95,936,950	92,706,573	92,706,573
Total General Fund	668,264,553	719,032,120	708,616,143	714,288,200
Lottery Funds				
Sports Lottery	8,592,720	11,430,510	-	8,000,000
Debt Service	14,394,033	38,788,687	28,488,687	28,488,687
Total Lottery	22,986,753	50,219,197	28,488,687	36,488,687
Grand Total	**$691,251,306**	**$769,251,317**	**$737,104,830**	**$750,776,887**

Oregon University System

Looking forward: Outcomes of GBB by OUS

	Legislatively Approved Budget			Governor's Balanced Budget Proposal			
	2011-13	2011-13	2011-13	2013-15	2013-15	2013-15	
University Support Funds:	General Fund	Lottery Fund	GF + Lottery	General Fund	Lottery Fund	GF + Lottery	% Change
Enrollment funding	$351,652,999	$0	$351,652,999	$379,903,638	$0	$379,903,638	8.03%
Regional support and regional university funding	$39,228,181	$0	$39,228,181	$41,959,763	$0	$41,959,763	6.96%
Engineering programs - Eng. Grad and UG	$7,995,399	$0	$7,995,399	$8,629,134	$0	$8,629,134	7.93%
5th site, OCATE, SW Oregon Univ. Center, OWEN	$6,044,305	$0	$6,044,305	$6,523,392	$0	$6,523,392	7.93%
EOU Rural Access	$459,790	$0	$459,790	$496,234	$0	$496,234	7.93%
Health Professions	$5,866,035	$0	$5,866,035	$6,330,992	$0	$6,330,992	7.93%
Research Funding - sponsored research/faculty salaries	$10,522,357	$0	$10,522,357	$11,356,385	$0	$11,356,385	7.93%
PSU New Leadership Institute	$118,941	$0	$118,941	$128,369	$0	$128,369	7.93%
OSU Veterinary diagnostic lab and phase-in funding	$2,227,515	$0	$2,227,515	$2,404,073	$0	$2,404,073	7.93%
Campus public service programs	$3,531,027	$0	$3,531,027	$3,810,905	$0	$3,810,905	7.93%
Chancellor's Office, system-wide programs and expenses	$20,585,092	$0	$20,585,092	$18,857,255	$0	$18,857,255	-8.39%
OSU SWPS building maintenance	$3,242,628	$0	$3,242,628	$3,499,647	$0	$3,499,647	7.93%
Subtotal University Support	$451,474,269	$0	$451,474,269	$483,899,787	$0	$483,899,787	7.18%

Oregon University System

Looking forward: Outcomes of GBB by OUS

Other Budgets of Interest to OUS	Legislatively Approved Budget	Governor's Balanced Budget Proposal		
	2011-13	2013-15		
OregonInc. + Innovation (in Oregon Business Develop. Budget)	GF + Lottery	GF + Lottery	11-13 to 13-15	% Change
OTRADI	$2,700,000	$1,700,000	($1,000,000)	-37.04%
BEST	$3,660,000	$8,000,000	$4,340,000	118.58%
ONAMI	$5,018,000	$6,100,000	$1,082,000	21.56%
Oregon Wave Energy	$2,412,000	$2,500,000	$88,000	3.65%
Drive Oregon	$1,158,000	$2,250,000	$1,092,000	94.30%
Unmanned Aerial Systems Center of Excellence	$0	$2,500,000	$2,500,000	
Portland Incubator Experiment & Oregon Film	$0	$900,000	$900,000	
Undefined Innovation	$0	$5,500,000	$5,500,000	
Total	$14,948,000	$29,450,000	$14,502,000	97.02%
OSAC				
Opportunity Grant	$99,921,326	$119,222,499	$19,301,173	19.32%
Aspire + Operations	$2,630,172	$3,915,943	$1,285,771	48.89%
Total	$102,551,498	$123,138,442	$20,586,944	20.07%

Oregon University System

Looking forward: Outcomes of GBB by OUS

	Legislatively Approved Budget			Governor's Balanced Budget Proposal			
	2011-13	2011-13	2011-13	2013-15	2013-15	2013-15	
Statewide Public Services at OSU	General Fund	Lottery Fund	GF + Lottery	General Fund	Lottery Fund	GF + Lottery	% Change
Agriculture Experiment Station	$51,793,494	$0	$51,793,494	$51,793,494	$0	$51,793,494	0.00%
Extension Service	$37,463,402	$0	$37,463,402	$37,463,402	$0	$37,463,402	0.00%
Forest Research Laboratory	$5,698,684	$0	$5,698,684	$5,698,684	$0	$5,698,684	0.00%
Other Public Services in OUS							
ETIC	$27,387,573	$0	$27,387,573	$29,030,827	$0	$29,030,827	6.00%
Dispute Resolution	$2,297,895	$0	$2,297,895	$2,435,769	$0	$2,435,769	6.00%
Oregon Solutions	$2,061,637	$0	$2,061,637	$2,185,335	$0	$2,185,335	6.00%
Clinical Legal Educ.	$318,450	$0	$318,450	$337,557	$0	$337,557	6.00%
Climate Research	$285,701	$0	$285,701	$302,843	$0	$302,843	6.00%
Natural Resources Institute	$454,111	$0	$454,111	$386,353	$0	$386,353	-14.92%
Signature Research Centers	$950,316	$0	$950,316	$1,007,335	$0	$1,007,335	6.00%
Oregon Metals Initiative	$684,094	$0	$684,094	$725,136	$0	$725,136	6.00%
Industry Partnerships	$606,650	$0	$606,650	$643,049	$0	$643,049	6.00%
Subtotal Public Services	$35,046,427	$0	$35,046,427	$37,054,204	$0	$37,054,204	5.73%
Other:							
Sports Lottery	$0	$8,592,720	$8,592,720	$0	$0	$0	-100.00%
Debt Service	$86,788,277	$14,394,033	$101,182,310	$92,706,573	$28,488,687	$121,195,260	19.78%
Totals (incl. University Support Funds	**$668,264,553**	**$22,986,753**	**$691,251,306**	**$708,616,144**	**$28,488,687**	**$737,104,831**	**6.63%**

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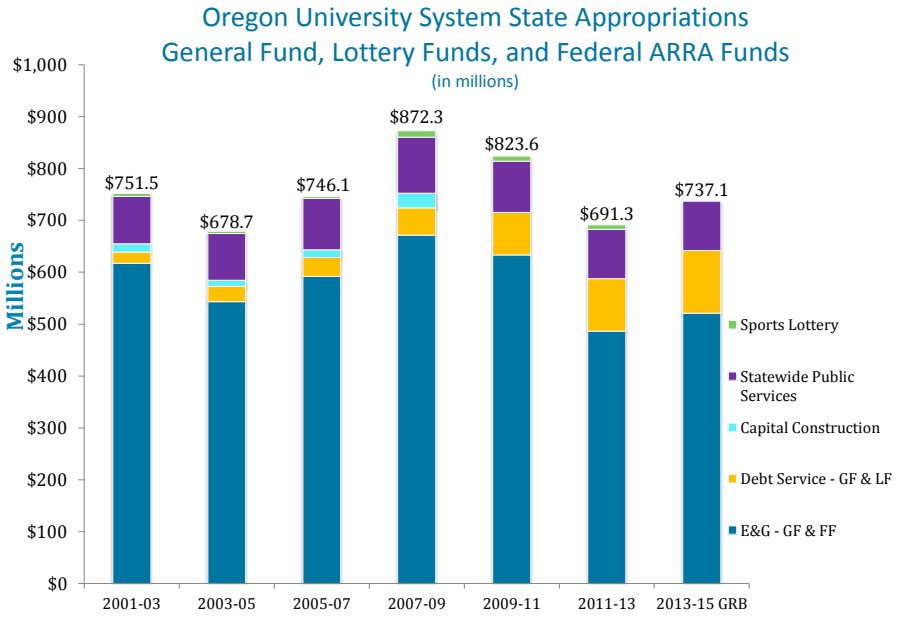

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Looking forward: Outcomes of GBB by OUS

PERS Reforms

- Avoid cost increases ~$100M in 2013-15
- Reduces need for +2% tuition increase
- Addresses unfunded pension obligations now & future

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GBB for OUS a good start, but please consider:

Tuition

- Requires a **6% tuition increase** in each of the next two years due to:
  - Lack of enrollment growth funding
  - Cost growth in salaries, PEBB, and general inflation

Student Equity

- To **accomplish 40-40-20** will require OUS to reach deeper into high school graduating classes:
  - Additional student services (advising and counseling)
  - Additional financial aid

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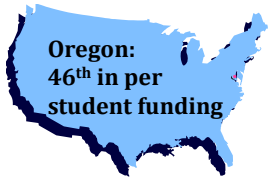
State funding and tuition

				Inflation adjusted			
	2003	2012	% Change	2003	2012	% Change	$ Change
Resident Tuition	$3,170	$6,237	96.75%	$3,857	$6,237	61.70%	$2,380
State GF per student FTE	$4,677	$3,347	-28.44%	$5,691	$3,347	-41.19%	($2,344)
Total	$7,847	$9,584		$9,548	$9,584		
Cost per student	**$8,868**	**$12,505**	**41.01%**	**$10,790**	**$12,505**	**15.89%**	**$1,715**

Tuition driven by state funding



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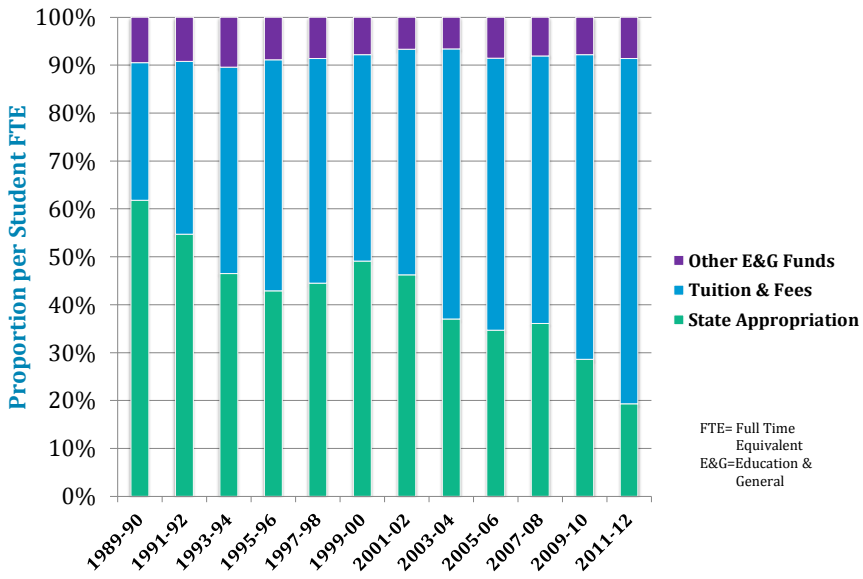
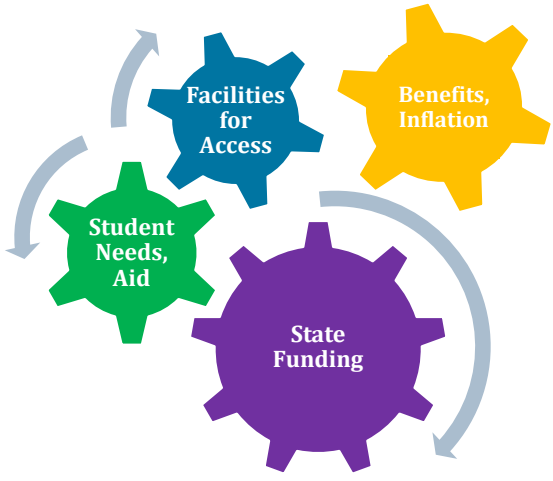
OUS Revenue Sources per Student FTE



FTE= Full Time Equivalent
E&G=Education & General

Cost Drivers in Higher Education

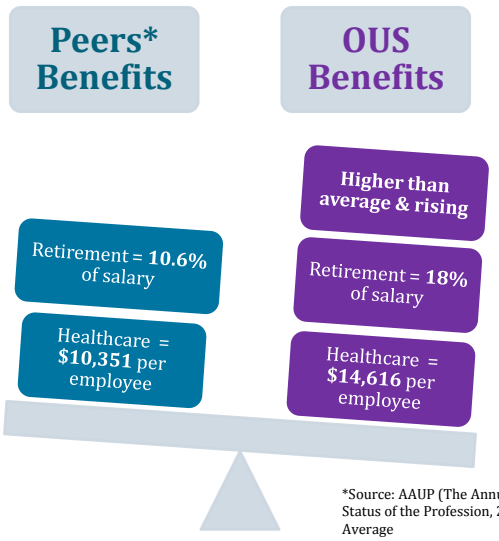


Oregon University System

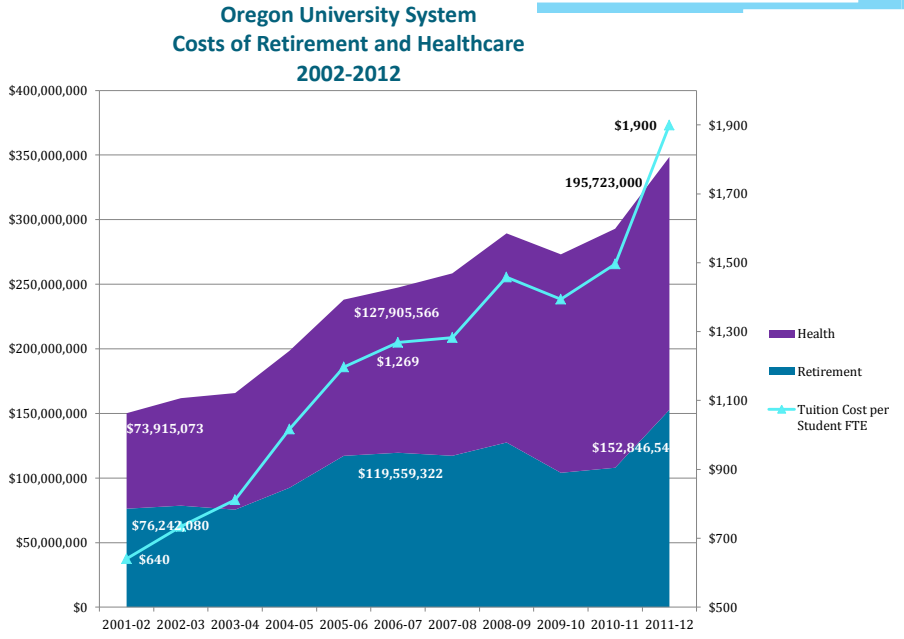
Total Operating Costs 1996-2012 (up 152%)

	FY 1996	FY 2001	FY 2006	FY 2012	1996-2012
Faculty/Staff Salaries & Pay	$387,925,192	$495,923,521	$619,278,625	$860,884,853	121.9%
Student/Grad Pay	$51,086,626	$63,760,530	$85,489,857	$118,740,781	132.4%
Other Payroll Expenses (OPE)	$149,603,561	$198,956,109	$327,922,083	$481,738,455	222.0%
	$588,615,379	$758,640,160	$1,032,690,565	$1,461,364,089	148.3%
Operating Expenses	$194,735,405	$283,224,914	$360,704,221	$495,664,843	154.5%
Facilities (rent, debt and utilities)	$65,434,555	$80,626,695	$123,716,500	$236,297,073	261.1%
IT & Telecom	$38,500,403	$43,979,221	$49,819,698	$58,486,355	51.9%
Assessments	$11,580,819	$14,180,149	$21,213,139	$36,943,933	219.0%
Capital Outlay	$30,799,267	$28,284,526	$26,298,520	$45,262,433	47.0%
Net Transfers	$9,991,955	$3,701,089	$3,734,139	$33,540,303	235.7%
Total Expenses	$939,657,782	$1,212,636,754	$1,618,176,783	$2,367,559,029	152.0%

Benefits costs rising faster than funding



*Source: AAUP (The Annual Report on the Economic Status of the Profession, 2012): Public Institutions Average



47

Enrollment up 63%, Research up 134%, Employee Numbers up 39%, from 1996-2012

OUS Headcount Employees – Classified Staff, Unclassified Faculty/Professionals and Graduate Assistants

	1996	2001	2006	2012	% Change
EOU	295	313	369	365	23.73%
OIT	327	345	362	357	9.17%
OSU	4,103	4,310	4,722	5,104	24.40%
PSU	1,303	1,568	2,320	2,811	115.73%
SOU	565	675	618	590	4.42%
UO	3,229	3,555	3,823	4,638	43.64%
WOU	521	600	633	716	37.43%
CO	171	185	79	81	-52.63%
	10,514	11,552	12,927	14,662	39.45%

During this same time period OUS enrollment up from 61,614 to 101,393, and research up from $178M to $418M.

Oregon University System

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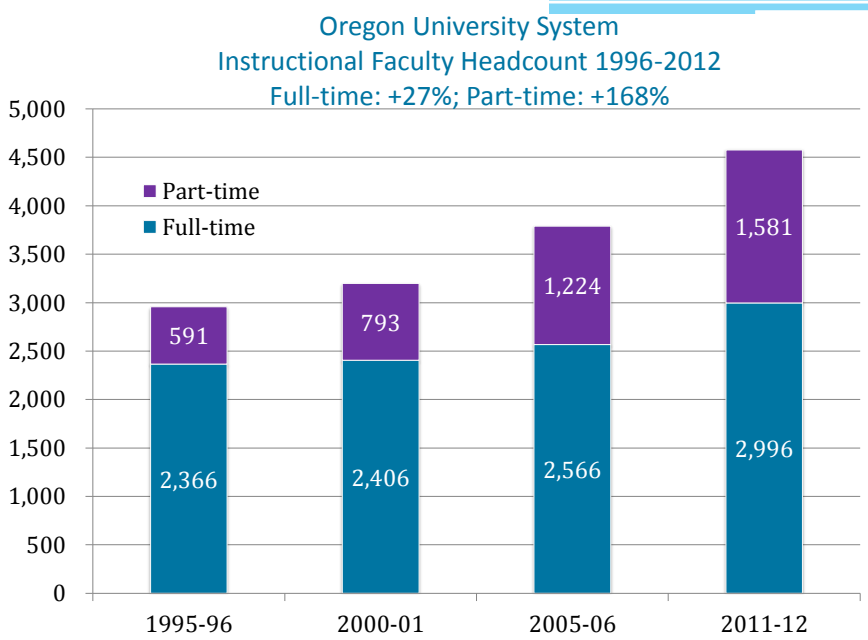
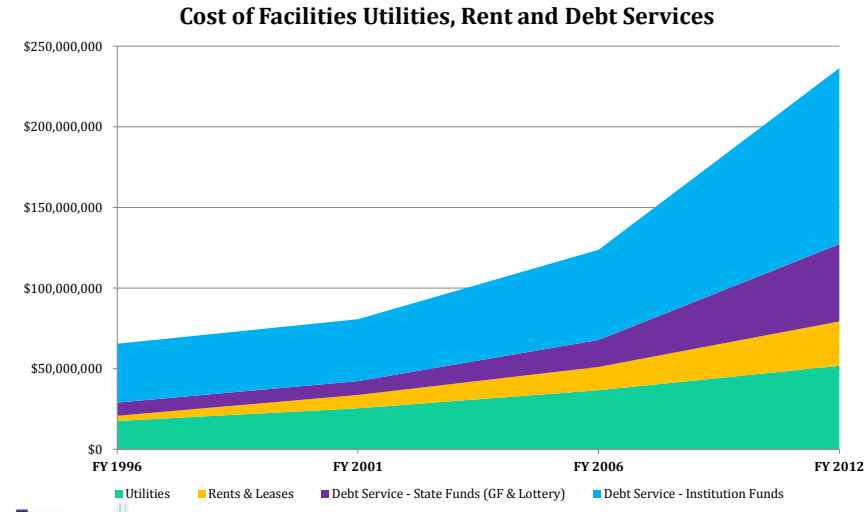


Facilities Costs 1996-2012
Up from $65M to $236M or a 261% Increase



Oregon University System

OUS Administrative Costs

Amounts in thousands					1996-2012
Institution	1996	2001	2006	2012	**% Change**
EOU	$2,846	$2,915	$4,440	$5,299	86.19%
OIT	$4,871	$4,332	$3,888	$4,762	-2.24%
OSU	$28,231	$23,073	$37,277	$52,258	85.11%
PSU	$11,615	$13,636	$17,235	$28,354	144.12%
SOU	$6,681	$6,036	$4,477	$5,739	-14.10%
UO	$23,238	$21,627	$33,324	$61,999	166.80%
WOU	$3,947	$4,433	$4,739	$4,340	9.96%
CO	$12,853	$19,113	$11,891	$13,265	3.21%
Total OUS	**$94,282**	**$95,165**	**$117,271**	**$176,016**	**86.69%**

Oregon University System

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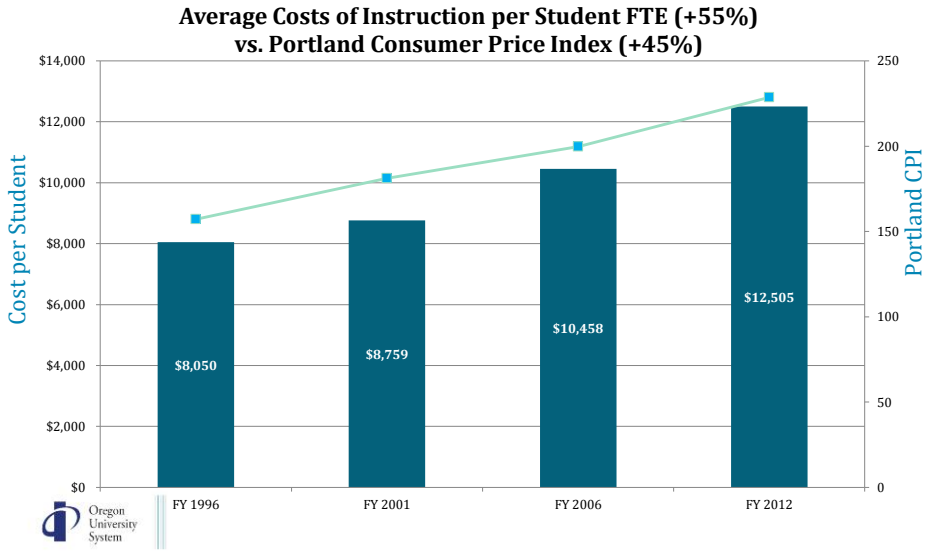
Average Cost of Instruction 1996-2012



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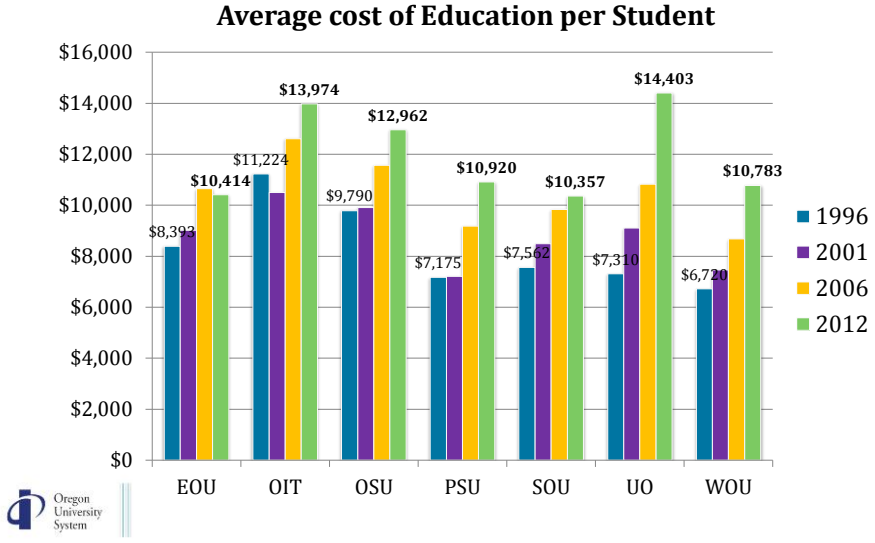
Average Cost of Education per Student by Campus



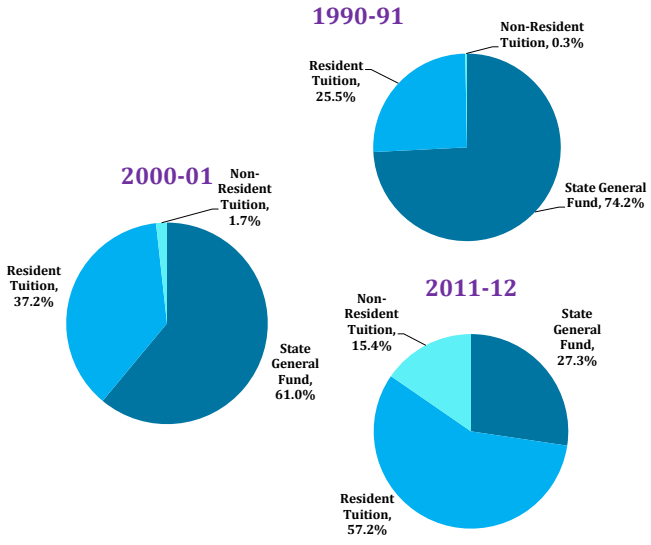
Costs of Education for Resident Students and Associated Funding Sources

Average Cost of Education:

1990-91 = $6,285

2000-01 = $8,759

2011-12 = $12,505



SB 242: Student and State Benefits

Tuition can be used for current students

Lower costs

Greater accountability

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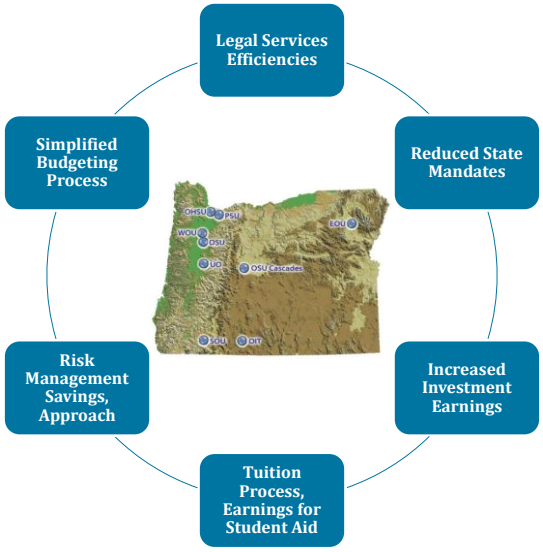
SB 242: Savings, efficiencies, accountability



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Board Oversight and Accountability

Approve:

- Operating and capital budgets (requests and allocations)
- External audit report on financial statements, A-133, Athletics, and other audits
- Annual internal audit plans
- Annual evaluations of Chancellor, Presidents, and Internal Audit Executive
- Annual tuition rates
- All Administrative Rules
- Capital projects in excess of $5 million

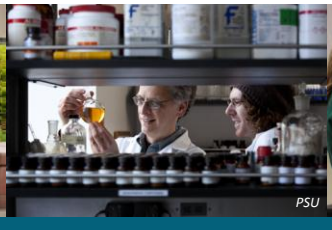
Review:

- Budget to actual and projected amounts to fiscal year-end (quarterly)
- Investment returns (quarterly)
- Internal audit progress reports (quarterly)
- Risk management claims/settlements (quarterly)
- Review of financial statements and key ratios (annually)
- Significant policies and procedures (as needed)
- Other items of significance (as needed)
- Each institution prepares five year revenue and expense forecasts for Board review and discussion (annually)
- Performance Reports and Fact Books

Oregon University System

Thank you for your time and attention today.

Contact: Jay Kenton – jay_kenton@ous.edu or 541-737-3646



Accountability for Student Success

Oregon University System

Dr. Melody Rose, Chancellor, Oregon University System
Dr. Jim Middleton, Director, Oregon State Board of Higher Education; President, Central Oregon Community College

Joint Committee on Ways and Means, Subcommittee on Education, March 21, 2013

Oregon University System

A History of Accountability for Oregon

OUS uses performance metrics to monitor improvement, examine trends that may affect higher education in the state, and focus strategies toward student success and the 40-40-20 goals

The system office has produced the comprehensive OUS Fact Book for the last 25 years and has monitored performance in numerous formats for decades

Results are communicated to the Board, Legislature, OEIB, campus, and public through a variety of publications

Oregon University System

Current Accountability Systems

The OUS monitors and formally reports campus performance in several publications and formats, including:

Achievement Compacts (current)

- Annual, outcomes based measures only
- Campus and system, with breakouts for disadvantaged students
- May implement Regional Compacts

OUS Board Performance Reports

Presidential Evaluation metrics

DAS Annual Performance Reports

Oregon University System

OUS Achievement Compacts Focus on Outcomes for Completion, Quality, Connections

Completion	Quality	Connections
Bachelor's degrees	Employer satisfaction *(Future Submission)*	New freshmen with early college credit
Bachelor's degrees to rural students	Alumni satisfaction *(Future Submission)*	Bachelor's degrees to Oregon Community College Transfer
Advanced degrees	Percent of Graduates unemployed in Oregon compared to the workforce unemployed in Oregon *(Future Submission)*	

Each outcome measure above is reported for all Oregonians, and for disadvantaged populations including underrepresented minorities and for economically disadvantaged Oregonians.

Oregon University System

OUS Board Performance Reports focus on 6 Key Goal Areas

- **Educated Citizenry**
- **Access and Affordability**
- **Student Progress and Completion**
- **Graduate Success**
- **Knowledge Creation and Innovation**
- **Fiscal Stewardship**

Oregon University System

Student Access & Affordability

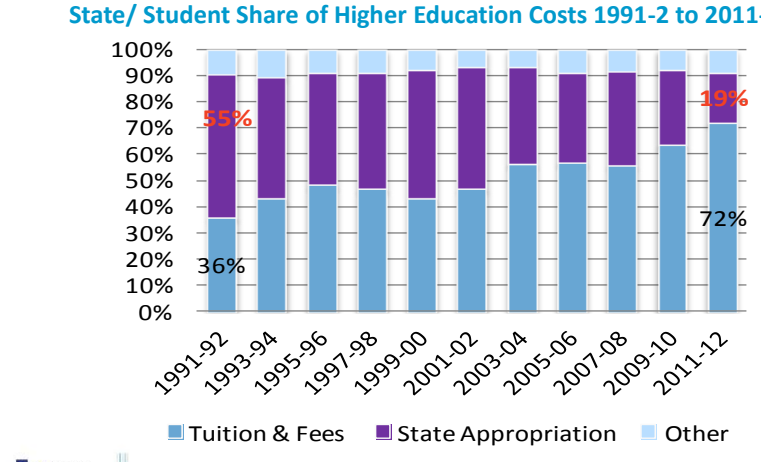
Oregon University System

Dr. Joe Holliday, Assistant Vice Chancellor for Student Success Initiatives, Oregon University System
Dave McDonald, Vice Provost, Western Oregon University
Carla Villanueva, Student, University of Oregon, Pathway Oregon participant

Joint Committee on Ways and Means, Subcommittee on Education, March 21, 2013

Oregon University System

Student Share of Higher Education Costs is Increasing



Oregon University System

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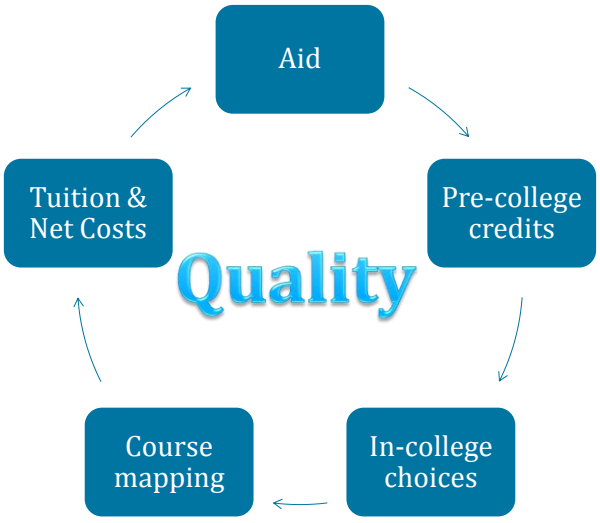
Affordability is more than tuition



Oregon University System

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Affordability is a partnership

Financial Aid Growth all Sources 1996-2012			
Federal: $154M to $747M Grants – $30M to $149M (+397%) Loans - $124M to $597M (+383%)	State: $7M to $25M (+268%)	Campus: $22M to $94M (+337%)	Private or Foundation $10M to $48M (+359%)

Oregon University System

OUS Students' Debt & Default Rates

Student Loan Debt and Default Rates for OUS Institutions Median and Average Debt and Default Rates				
Institution	**Median Debt 2010-11***	**Median Payment***	**Mean (Average) Debt Class of 2011****	**Default Rate FY2010*****
Eastern Oregon University	$15,559	$179.05	$21,973	7.8%
Oregon Institute of Technology	NO DATA AVAILABLE FROM THIS STUDY		$25,546	3.1%
Oregon State University	$19,166	$220.56	$22,412	2.8%
Portland State University	$18,832	$216.72	$26,287	4.6%
Southern Oregon University	$19,337	$222.53	$28,907	3.9%
University of Oregon	$19,999	$230.15	$22,736	2.9%
Western Oregon University	$17,868	$205.63	$23,839	4.3%

*_The Wall St. Journal_ analysis of US Dept. of Education data set
**SOU Common Data Set, OIT &OSU Financial Aid Offices, and Pew Project on Student Debt
***National Student Loan Data System, US Dept. of Education

Oregon University System

Helping students understand and manage debt

Impacts
- Tuition, more low-income students
- Recession on costs, borrowing, repayment

Focus
- Debt-to-income ratio, high borrowing/low salary
- Most at-risk students: early warning systems

Results
- System-wide policy beyond mandated counseling
- Help embedded across the campus

Oregon University System

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Supporting underserved students pays off

Oregon University System

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UO's Pathway Oregon: Aid & Support for Oregonians

Oregon University System

Capital Construction Program

Oregon University System

Dr. Jay Kenton, Vice Chancellor, Finance and Administration, Oregon University System
Kirk Schueler, Director, Oregon State Board of Higher Education; Chief Administrative Officer, St. Charles Health System

Joint Committee on Ways and Means, Subcommittee on Education, March 25, 2013

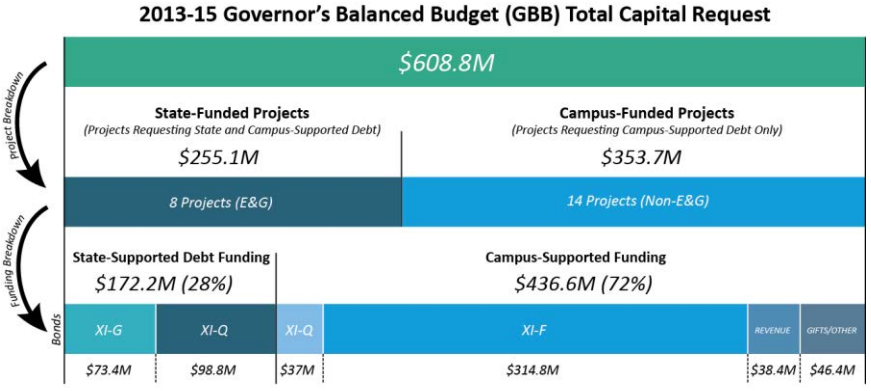
Oregon University System

Capital Program: Building for 40-40-20

Oregon University System

Capital Budget: Leveraging State Funds

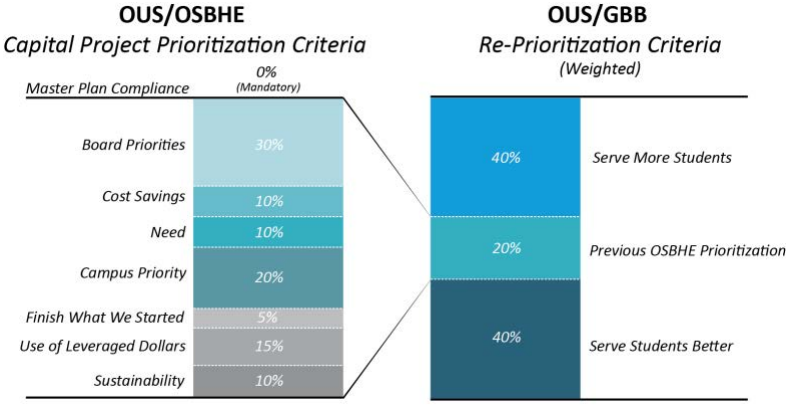
2013-15 GBB Breakdown



Oregon University System

Capital Budget: Prioritizing Capacity

40-40-20 Re-Prioritization – *Criteria*



Oregon University System

Capital Budget: Partnerships

State and Donors – *Partnering for Success*

2013-15 GBB Projects – *State-Funded (E&G)*

OUS Ranking	OUS/GBB Ranking*	Campus	Project Name	Project Total	State-Supported Debt Funding
1	1	PSU	School of Business Administration - Addition/Renovation	$50,000,000	$40,000,000
2	2	UO	Straub Hall and Earl Halls Classroom Expansion	$22,000,000	$11,000,000
3	3	SYS	Capital Renewal Code and Safety	$30,000,000	$30,000,000
5	4	OSU	Chemical, Biological, and Environmental Engineering Building	$40,000,000	$20,000,000
7	5	OSU	Classroom Building and Quad	$65,000,000	$32,500,000
7	5	WOU	New College of Education Facility	$18,600,000	$17,200,000
9	7	OSU	Cascade Campus Expansion	$24,000,000	$16,000,000
4	8	SOU	Theatre Arts Building Expansion and Remodel	$5,500,000	$5,500,000
Subtotal: Projects with State Funding				***$255,100,000***	***$172,200,000***

**OUS Revised Priority Ranking, as of January 9, 2013*

Oregon University System

Capital Budget: Partnerships

Campus and Students – *Partnering for Student Success*

2013-15 GBB Projects – *Campus-Funded*

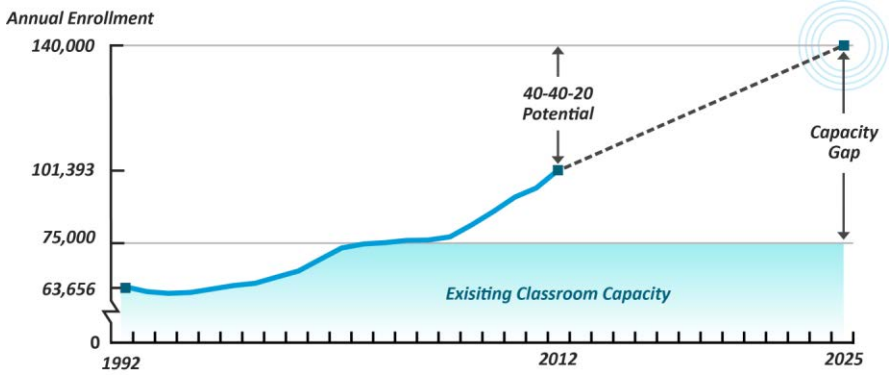
OUS Ranking	OUS/GBB Ranking*	Campus	Project Name	Project Total	State-Supported Debt Funding	Campus-Supported Debt Funding
1	1	OUS	Building Miscellaneous Student Fee Projects	$20,000,000	$0	$20,000,000
2	2	OUS	Commercial Paper (Short Term Financing Pre-bonding)	$15,000,000	$0	$15,000,000
3	3	OUS	Financing Agreements	$20,000,000	$0	$20,000,000
4	4	OIT	InFocus Acquisition	$10,000,000	$0	$10,000,000
5	5	OSU	Modular Data Center Facilities	$7,000,000	$0	$7,000,000
6	6	OSU	Underground Communications Infrastructure	$10,000,000	$0	$10,000,000
7	7	OSU	Real Estate Acquisitions	$5,880,000	$0	$5,880,000
8	8	OSU	Housing and Dining Upgrades	$9,500,000	$0	$9,500,000
9	9	PSU	Land Acquisition	$10,000,000	$0	$10,000,000
10	10	SOU	Student Recreation Center	$20,000,000	$0	$20,000,000
11	11	SOU	Cascades Hall Replacement	$7,000,000	$0	$7,000,000
12	12	UO	Student Recreation Center Expansion and Renovation	$50,250,000	$0	$50,250,000
13	13	UO	University Housing Expansion	$84,750,000	$0	$84,750,000
14	14	UO	Erb Memorial Student Union Expansion and Renovation	$84,300,000	$0	$84,300,000
Subtotal: Projects without State Funding				***$353,680,000***	***$0***	***$353,680,000***
Total Request				***$608,780,000***	***$172,200,000***	***$390,180,000***

**OUS Revised Priority Ranking, as of January 9, 2013*

Oregon University System

40-40-20 Goal: Defining the Challenge

40-40-20 Growth Potential – *2012-2025*

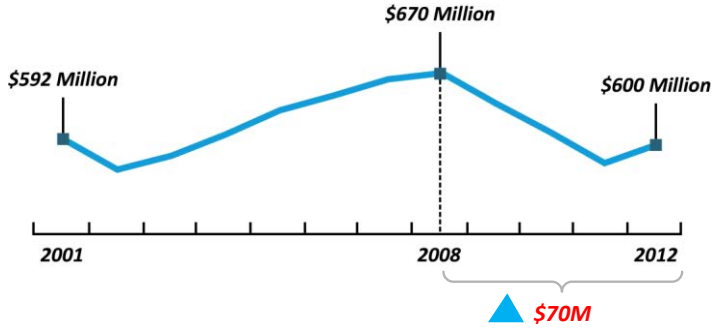


Source: OUS Capital and Facilities Planning, based on data from OUS Institutional Research and 2012 Capacity Analysis by Sasaki and Associates

Oregon University System

Stewardship: Measuring Progress

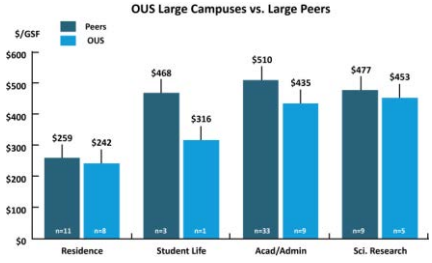
Deferred Maintenance Backlog – *2001-2012*



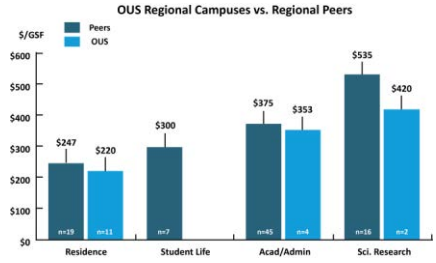
Oregon University System

Cost: Managing for Lower Project Costs

Peer Comparison – *Average Total Project Cost/SF by Type*



*Large Peer School Sample Size 56



*Regional Peer School Sample Size 87

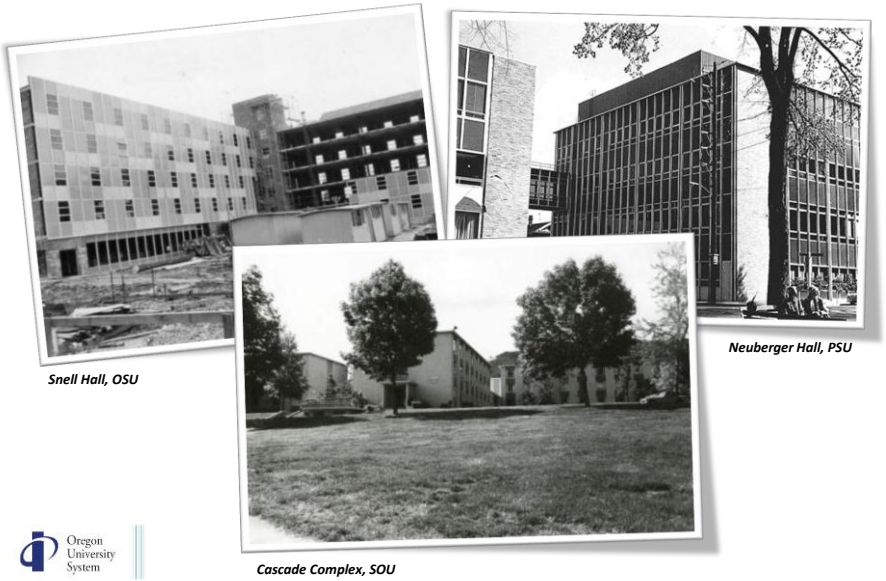
Oregon University System

Cost: Smart Choices for a Positive ROI

Component Lifespan Cost – *Commercial vs. University*

Component Group	Component Cost: Good Commercial	Component Cost: University Construction	Component Cost: Cost Difference	Estimated Lifespan in Years: Good Commercial	Estimated Lifespan in Years: University Construction	Delta: Cost (% Diff)	Delta: Life (% Diff)
HVAC							
• Reheat Coils	*$0.56 Copper*	*$0.26 E-Coated*	*($0.30)*	40	40	52%	0%
• Exhaust Duct	*$6.50*	*$8.00*	*$1.50*	25	40	23%	60%
• Air-Handlers w/ Heat Recovery	*$7/CFM*	*$8.50/CFM*	*$1.50/CFM*	25	30	21%	20%
• VAV vs. Chilled Beam	*$25/SF (VAV)*	*$36/SF (Chilled)*	*$11/SF*	20	40	44%	100%
• Solar Thermal	*$0*	*$200/SF Panels*	*$200/SF Panels*	NA	NA	1.50%	NA
Roofing/Exterior Skin							
• Roof Warranty	*10 year*	*20 year*	*$.50/SF Materials*	15	25	23.00%	200%
• Flashings	*Prefinished, $6*	*Stainless, $10*	*$4/LF*	25	60-100	66%	>240%
• Single Ply vs. Built-Up Roofing	*$11/SF (TPO)*	*$13.50/SF(BUR)*	*$2.50/SF*	20	30	23%	50%
• Wood Siding vs. Brick	*$8/SF (Hardiplank)*	*$21.00/SF(Brick)*	*$13/SF*	20	75	263%	275%
Door Hardware							
• Door Hardware	*$850/Opening*	*$1200/Opening*	*$350*	10	20	41%	100%
• Door Handles/Locksets	*Grade 2: $200*	*Grade 1: $300*	*$100*	5	10-20	50%	>200%
• Panic Hardware	*Grade 2: $400*	*Grade 1: $800*	*$400*	5	10-20	200%	>200%
Plumbing							
• PEX vs. Copper Tubing	*$10/LF*	*$25/LF*	*$15/LF*	30	50	150%	66%
• Lavatory Faucets	*$262 (Installed)*	*$362*	*$100.00*	8	20	39%	250%
Finishes							
• Impact Resistant Board	*$1.28/SF*	*$1.86/SF*	*$0.58/SF*	10	20	45%	100%
• Carpet vs. Honed Concrete	*$3.50/SF*	*$7/SF*	*$3.50/SF*	15	50	100%	233%
Elevators							
• (3-Stop) Wall, Ceiling and Floor Finishes, Controllers	*$60,000*	*$75,000*	*$15,000*	10	20	25%	100%
Electrical							
• Controls	*$2.50/SF*	*$4.00 /SF*	*$1.50/SF*	15	20	60%	33%
• Lighting	*$5/SF*	*$6.50 /SF*	*$1.50/SF*	15	20	30%	33%
Telephone/Data & Security							
• Data	*$3.00/SF*	*$4.00/SF*	*$1.00/SF*	30	30	33%	0%
General							
• Prevailing Wages	*25% of Hard Costs*	*27.5% of Hard Costs*	*2.50%*	NA	NA	2.50%	NA
• 1% for Art	*NA*	*1% Project Cost*	*100%*	NA	NA	100%	NA

Lifespan: The High Cost of Building Cheap



Snell Hall, OSU

Neuberger Hall, PSU

Cascade Complex, SOU

Oregon University System

Economic Impact: Paths to Prosperity

Three Tiers of Economic Development – *Job Creation*

2013-15 Capital Budget
Economic Impact Potential

Potential Jobs Created	*5,472*
Potential Economic Output	*$1.3 Billion*
Potential Earnings Increase	*$852 Million*

Oregon University System

Closing the Capacity Gap
Meeting the Growth Challenge

Portland State University – *SBA Addition and Remodel*

PSU, School of Business Administration (SBA) – Proposed

Oregon University System

Closing the Capacity Gap
Meeting the Growth Challenge

Oregon State University – *Classroom, CBEE, Cascades*

OSU, Classroom Building

OSU, CBEE Building

OSU, Bend Campus

Oregon University System

Closing the Capacity Gap
Meeting the Growth Challenge

University of Oregon – *Straub and Earl Halls*

UO, Straub Hall

UO, Earl Hall

Oregon University System

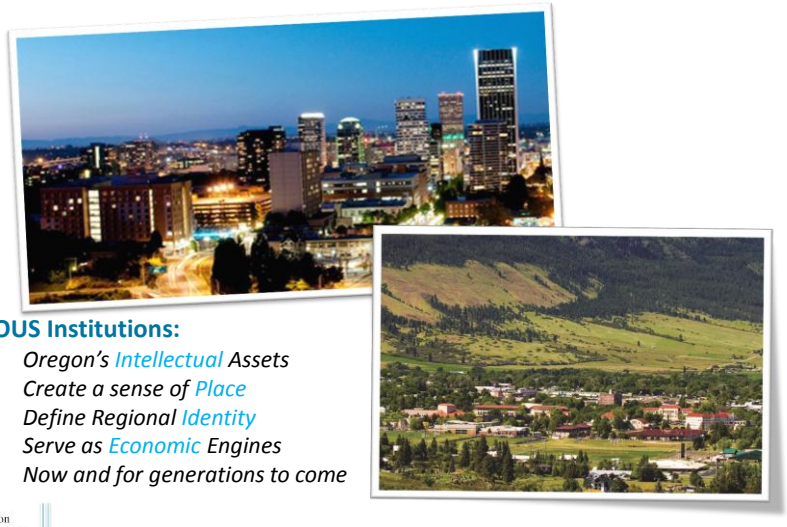
Growing Teachers
Creating Innovative Wood Industries

Western Oregon University – *New College of Education*

WOU, New College of Education (Proposed)

Oregon University System

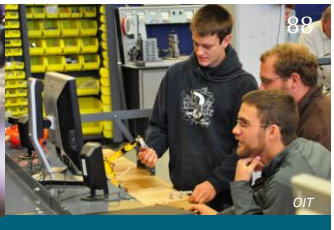
Institutions: *Anchors for Oregon's Prosperity*



OUS Institutions:

- *Oregon's Intellectual Assets*
- *Create a sense of Place*
- *Define Regional Identity*
- *Serve as Economic Engines*
- *Now and for generations to come*

Oregon University System



Growing Jobs and Transforming Oregon's Economy

Oregon University System

Jill Eiland, Vice President, Oregon State Board of Higher Education; Northwest Region Corporate Affairs Manager, Intel Corporation

Dr. Lynda Ciuffetti, Director, Oregon State Board of Higher Education; Professor of Botany and Plant Pathology, Oregon State University

Dr. Chris Maples, President, Oregon Institute of Technology

Joint Committee on Ways and Means, Subcommittee on Education, March 25, 2013

Oregon University System

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Oregon's Public Universities: Driving Oregon's economy

Almost $6 Billion Campuses' impact statewide

13,000 benefits eligible jobs, rural & urban

5,472 jobs from capital construction in 2013-15

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Education Drives Returns to Oregon

	State Cost Per Degree	Total Cost to Educate	State Taxes' Returns	Local Taxes' Return	Federal Taxes' Return	Social Safety Net Savings	Incar-ceration Savings	Volun-teerism Return	Net Return to Oregon
HS Diplo-ma	$ 108,726	$ 108,726	$ 21,011	$ 48,609	$ 4,369	-	-	$ 1,849	$ -32,887
AA & Trans.	$ 6,708	$ 115,434	$ 30,683	$ 55,452	$ 42,832	$ 13,331	$ 7,976	$ 3,894	$ 28,896
BA	$ 22,937	$ 131,663	$ 50,830	$ 74,198	$ 106,444	$ 28,547	$ 10,317	$ 5,880	$ 123,525
MA	$ 19,378	$ 151,041	$ 60,148	$ 79,515	$ 125,976	$ 28,547	$ 10,317	$ 5,880	$ 138,314
PhD	$ 64,988	$ 196,651	$ 84,113	$ 91,049	$ 408,299	$ 28,547	$ 10,317	$ 5,880	$ 410,527

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Research: Preparing Students, Driving Innovation

Research for Undergrads, Grad Students	• Hands-on, theory to practice • Workforce prep
Innovation	• Next-generation innovations for industry • Commercialization
Job Creation	• Retaining & growing Oregon companies, jobs • Attracting new companies, more jobs

Oregon University System

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Oregon TECH

Future Workforce

#1* Starting Salaries in Oregon

#1* Mid-career Salaries in Oregon

#38* (of 1058) Starting Salaries in US

STEM: **1.7 jobs** for every **1 unemployed person**

Non-STEM: **4.3 unemployed people** for every **1 job**

Oregon University System

*Source: http://www.payscale.com/college-salary-report-2013/full-list-of-schools

OREGON's
Land Grant University
is Helping Build

Oregon State UNIVERSITY OSU

bridges to prosperity

Extension Service
Agricultural Experiment Station
Forest Research Lab

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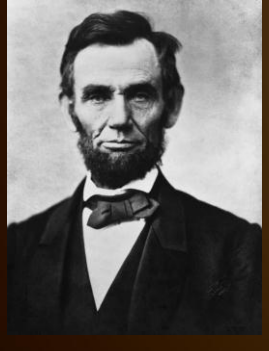
Oregon's
Land Grant University



OSU Oregon State UNIVERSITY
Oregon's Land-Grant University

Planet

Health

Economy

Oregon State UNIVERSITY Extension Service Agricultural Experiment Station Forest Research Lab

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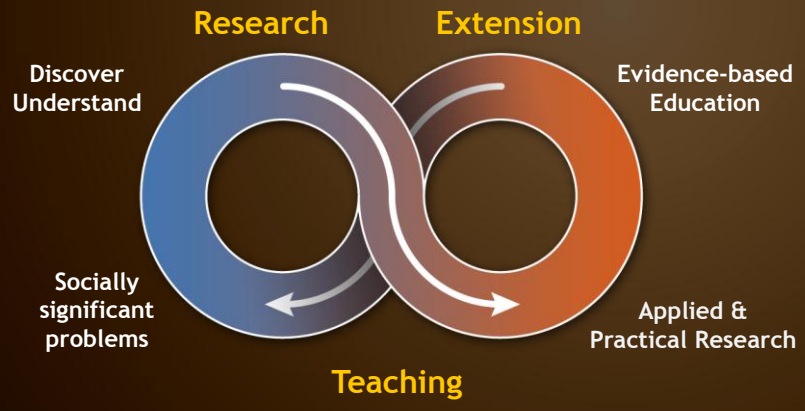
OSU's Statewide Programs improve the lives of Oregonians

The State is Our Campus

Statewide programs create innovation and opportunity



Healthy People

Extension programs work to prevent childhood obesity

Children change behaviors and build self esteem as they experience good nutrition and purposeful physical activity.

Healthy People

Extension programs train future leaders in science, engineering, and technology

Students explore robotics, computer science, and alternate energy in 4-H programs that reach more than 150,000 school children overall.

Healthy Planet

Agricultural Experiment Station research is cleaning up Portland Harbor

OSU leads the nation with $15 million NIH Superfund grant to develop techniques for cleaning severely polluted areas.

Healthy Economy

AES fermentation research creates a new economic culture in Oregon

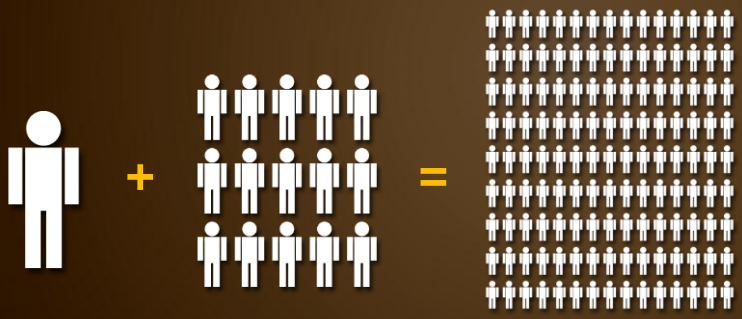
Beer, wine, cheese, bread, even biofuels are products of fermentation and areas of collaborative research by the Agricultural Experiment Station.

Healthy Economy

The Forest Research Laboratory helps expand markets for sustainable Oregon wood products

OSU works with Oregon industry to create and certify sustainable wood products to meet growing market demand.

Leveraging Human Capacity



Extension Faculty FTE	Trained Volunteers	Engaged Learners
177	14,048	2,130,824

Leveraging Financial Resources, FY12

State funding for SWPS	External grants & other funding	Total dollars
$46,528,000	$99,489,000	$146,017,000

ed.ray@oregonstate.edu

bridges to prosperity

Oregon State University OSU

Extension Service
Agricultural Experiment Station
Forest Research Lab

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Engineering & Technology Industry Council

Oregon University System

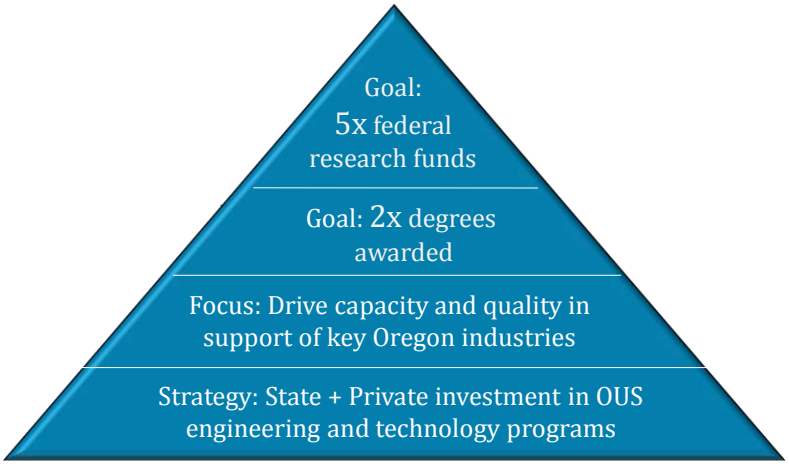
Dick Knight, Retired Technology Executive
Ryan Jenson, Doctoral Student, Engineering, Portland State University

Joint Committee on Ways and Means, Subcommittee on Education, March 25, 2013

Oregon University System

ETIC Baseline Goals

Building Oregon's Economy through Investing in Engineering Education & Research



ETIC Baseline Goals and Results

1999 (Baseline)		2012	% of Baseline
$30 million	Goal: 5x federal research funds	$82 million	273%
1,174*	Goal: 2x degrees awarded	1,846*	157%

Focus: Drive capacity and quality in support of key Oregon industries

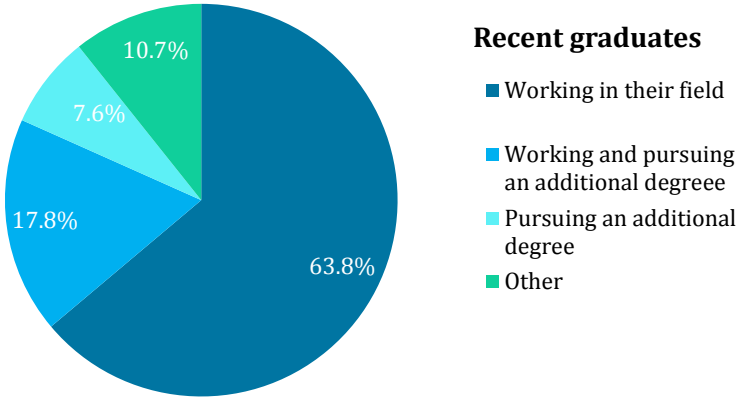
Strategy: State + Private investment in OUS engineering and technology programs

	Cumulative	2012
Private Investment:	$278 million	$23.0 million
State Investment:	$163 million	$13.7 million

*Includes undergraduate and graduate degrees awarded

High wage employment for Oregonians with critically needed skills

89% working in their field or pursuing an additional degree



ETIC Challenges and Directions

Shared public and private investment to:

Prepare Oregonians for high paying technology jobs

- Number & diversity of graduates

Support competitiveness of Oregon technology industry

- Match programs to industry needs and shortages
- Research to enhance Oregon industry competitiveness
  - Leverage State investment with private support from industry
  - Foster continued growth of federal research funding

Investment in ETIC will continue the important momentum developed over the past decade and contribute significantly to the economic well-being of Oregon's economy and citizens!

Education Continuum: Serving PK-20 Students through Collaborations

Oregon University System

Jilma Meneses, J.D., Chief Diversity Officer, Portland State University

Joint Committee on Ways and Means, Subcommittee on Education, March 26, 2013

Oregon University System

Preparing all for 40-40-20: Oregon students increasingly diverse

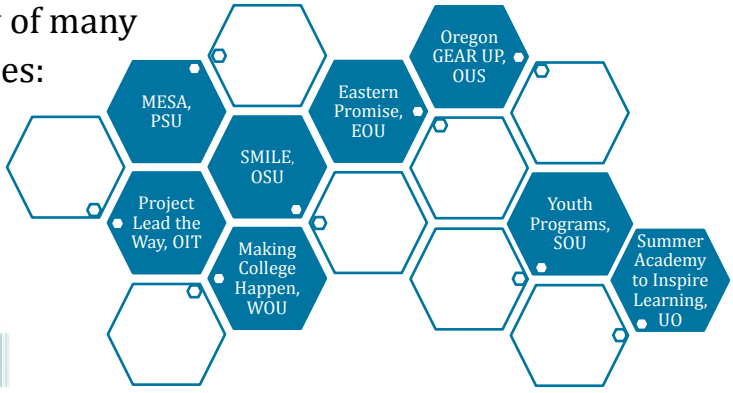
Increasing diversity	Hispanic/Latino growth	New approaches for 40-40-20
The fastest growing youth populations are among Oregonians who currently have low high school completion and college-going rates.	From 2008 to 2028, Hispanic/Latino Oregon high school graduates are expected to nearly triple from 12% to 33% of all graduates.	The educational system will need to better serve first-generation students, low-income students, rural students, students of all ages, and students of color.

Oregon University System

Pre-College Programs and Collaborations

Across all 7 campuses and the Chancellor's Office, over **90 programs serve more than 200,000 K-12 students each year.**

- A few of many examples:

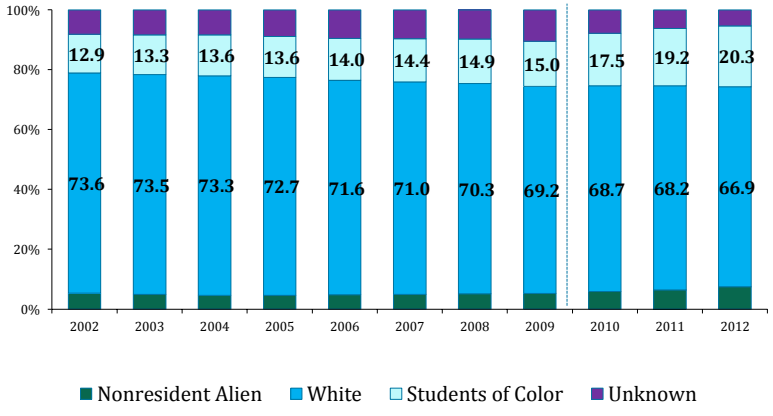


Oregon University System

OUS Enrollment by Ethnicity

Enrollment by Racial/Ethnic Group, Fall 2002 through Fall 2012

Students of Color Grouped in a Single Category

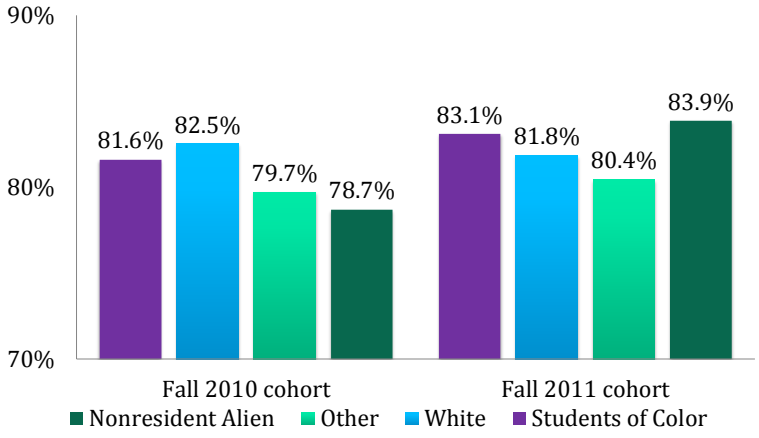


Oregon University System

Note: comparing data after 2010 with earlier years is problematic due to category definitions having changed. In 2010, the federal government modified the self-identifying survey options on ethnicity, with the result that that students that may have historically identified with one category may now report their identity differently, creating some inconsistencies with longitudinal data.

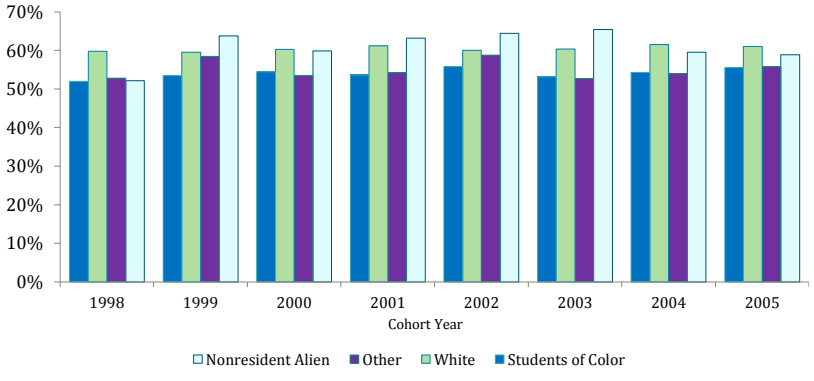
OUS Retention by Ethnicity

IPEDS First Time Freshman Cohorts, Fall 2010 and Fall 2011, Retained One Year Later



6-Year Graduation Rates by Ethnicity

IPEDS First-Time Freshman Cohorts, Fall 1998 (graduating by 2004) to Fall 2005 (graduating by 2011), *Students of Color Grouped in a Single Category*



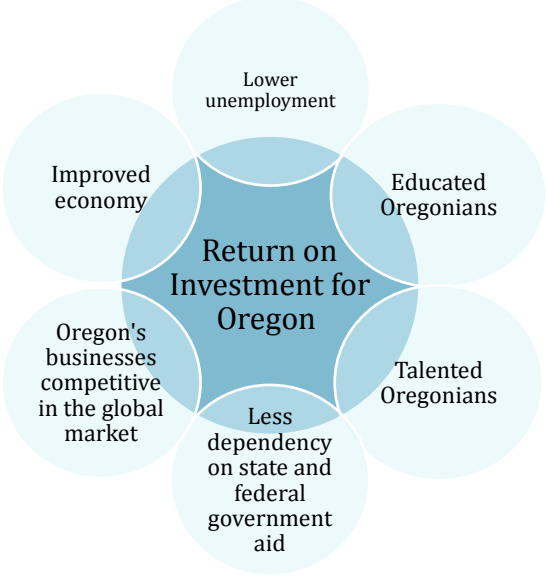
The OUS Achievement Compacts include targeted outcomes for disadvantaged students including degrees awarded to underrepresented minorities. OUS produced 274 more bachelor's degrees to underrepresented minority Oregonians than was projected in 2011-12, for a total of 1,412 degrees.

Investing in Diversity: the PSU Example

1. Expand pre-college events
2. Expand outreach to admitted students/families
3. Create post admission support systems
4. Partner with community organizations
5. Other branding and outreach

Oregon University System

Investing in Diversity



Oregon University System

Education Continuum: Oregon GEAR UP

Oregon University System

Kristin Adams, GEAR UP Coordinator, Sweet Home School District
Keith Winslow, Principal, Sweet Home High School
Kourtney Dixon, Student, Sweet Home High School

Joint Committee on Ways and Means, Subcommittee on Education, March 26, 2013

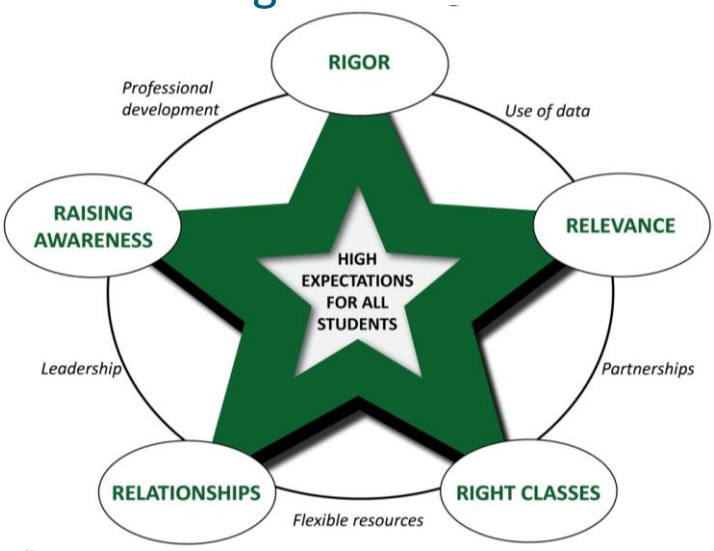
Oregon University System

Creating a college-going culture across Oregon

Oregon University System

green = Ford Family Foundation funded communities
black = US Department of Education funded communities

Model for Change



Oregon University System

SUPPORTING STUDENTS

7,908 students served

62% Free/reduced lunch

92% of parents

90% of students

76% of educators

CHANGING EXPECTATIONS

ENERGIZING EDUCATORS

Educators have a supportive network of consultants and practitioners for technical assistance, research questions, and more.

Oregon University System

Sweet Home High School

Oregon University System

Education Wrap-up

Oregon University System

Matthew Donegan, President, Oregon State Board of Higher Education
Paul Kelly, J.D., Director, Oregon State Board of Higher Education
Dr. Melody Rose, Chancellor, Oregon University System

Joint Committee on Ways and Means, Subcommittee on Education, March 26, 2013

Oregon University System

Oregon University System

CONTRIBUTING TO OREGON'S VITALITY: BACKGROUND DOCUMENTS

Wednesday, March 20, 2013

STATE BOARD OF HIGHER EDUCATION: SUPPORTING STUDENTS AND OREGON'S EDUCATION AND ECONOMIC NEEDS

The Board's duties and responsibilities that support Oregon students, ensure high quality, viable universities, and provide taxpayer accountability include:

- Define and enforce priority areas that meet statewide goals, such as initiatives to address underserved Oregon students, meet regional higher education needs, and advance the OUS research agenda and workforce needs.
- Develop and implement a System long-range plan is aligned with state higher education policy, and workforce and economic needs.
- Develop and implement policies and initiatives that address OUS governance, structure, programs, diversity and other areas that help the System and the state better serve the higher education needs of Oregonians.
- Assess and approve new academic programs, ensuring that there is no unnecessary program duplication within the System, and that programs are aligned with current and anticipated state education and workforce needs.
- Monitor each institution for performance and outcomes against achievement compacts and other indicators, and work with universities to address improvements; and provide outcomes-based budget for progress in key areas, such as degrees.
- Review and approve OUS institutions' missions, ensure alignment and manage the OUS "portfolio" across all seven OUS institutions and the branch campus.
- Monitor and review on at least a quarterly basis the financial management and condition of each OUS institution; and make recommendations that the universities or the System Office carry out regarding fiscal, management or other changes to campus budgets and operations, including fund balances and budget deficits.
- Promote inclusive campus tuition-setting processes and approve tuition and fee rates annually, ensuring that these are aligned with access and affordability goals and any legislative mandates.
- Engage in development and approve System operating and capital construction budgets, making policy or other changes that meet System and student needs. Develop initiatives and budget packages, working with the universities and other education stakeholders, to move the state forward in meeting strategic priorities.
- Establish capital construction policy and priorities for the System, including new construction, capital repair, and deferred maintenance. Review all new capital construction requests for approval consideration.

Board Composition and Committees

The Oregon State Board of Higher Education (the Board), the statutory governing board of the Oregon University System and its seven universities, is composed of fifteen members appointed by the Governor and confirmed by the Oregon State Senate. Eleven public members are appointed for four-year terms and two faculty and two student members are appointed for two-year terms (one from a large university and one from a small). The Board elects a president and vice president. Currently, only 13 members have been appointed.

The Board currently **has three standing committees** that meet regularly: Academic Strategies, Finance and Administration, and Governance and Policy.

- § Review and approve OUS universities' admissions requirements in alignment with K-12 Oregon Diploma.
- § Review all major financial and other audits of campuses and approve audit reports; make recommendations for new audits or schedules; set new audit policy and define special audits.
- § Make decisions regarding hiring, firing, and performance reviews of the Presidents and Chancellor, the former in collaboration with the Chancellor.

Current State Board of Higher Education Members	Term expiration date
Matthew W. Donegan, Board President	2013
Jill W. Eiland, Board Vice President	2013
Lynda M. Ciuffetti	2014
Brianna R. Coulombe	2013
Orcilia Z. Forbes	2014
Allyn C. Ford	2013
James L. Francesconi	2016
Farbodd A. Ganjifard	2013
Paul J. Kelly, Jr	2015
James E. Middleton	2016
Emily J. Plec	2013
Kirk E. Schueler	2013
David V. Yaden	2016

For more information on the Board of Higher Education go to www.ous.edu/state_board.

GROWTH IN STUDENT ENROLLMENT AND DEGREE COMPLETION

The Oregon University System currently enrolls and awards degrees to a record number of students and a more diverse student body than ever before as it progresses toward the 40-40-20 goal. Enrollment (headcount) in the Oregon University System reached an all-time system high of 101,393 students in 2012, and Oregon was recently recognized for having among the **highest 5-year enrollment growth in public postsecondary education of any state in the nation.**

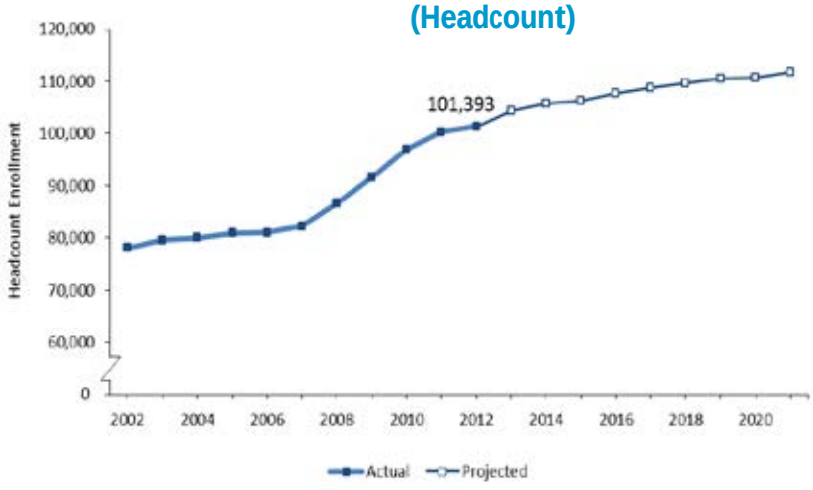
Oregon's education system is moving towards outcomes—degrees and successful graduates—as a way to measure student and statewide success. The OUS Achievement Compacts include reporting and goals for 8 outcome measures in the areas of completion, quality, and connections with other education sectors. Each measure is reported for all Oregon students, for underrepresented minority Oregon students, and for economically disadvantaged Oregonians. The ultimate outcome of increased enrollment over time is an increased number of degrees attained by OUS students. **OUS awarded 20,209 bachelor's and advanced degrees in 2011-12, also an all-time high for the system**.

As enrollment grows, **OUS universities are serving more students with less state funding per student**; during the period from 2003 to 2012, enrollment increased by 27.4% while state General Fund appropriation per FTE declined by 28.4%. This level of enrollment growth set against a backdrop of declining state appropriations remains a growing challenge for public higher education in Oregon as the system strives to meet the demand for a college education and to provide high quality instruction and support.

Student Enrollment and Degrees Increase Toward the 40-40-20 Goal

OUS reached an all-time system high of 101,393 students (headcount) in 2012, an increase of 1.1% and 1,077 students from 2011, with the most diverse and most qualified entering class ever. This is a 5-year increase of 23.3%, keeping OUS on **a trajectory just slightly short of the state's 40-40-20 goal by 2025.** This follows on the heels of the largest graduating class ever in 2011-12.

Total and Projected Enrollment (Headcount)



OUS awarded 20,209 bachelor's and advanced degrees in 2011-12, an 8.1% increase over 2010-11, with bachelor's degrees alone totaling 15,492. As record high number of graduates departed the campuses this past June, the enrollment increase was slightly lower than in recent years. OUS saw especially high enrollment increases between 2007 and 2011, as more students pursued college to earn degrees and increase career skills during the economic downturn.

The 2012 enrollment growth reflects an **influx of out-of-state and international students, and growth in high demand fields**, such as engineering and healthcare, where targeted university investments continue to support an increasing number of students. Ten year enrollment growth for OUS increased 29.8% and almost 23,300 students since 2002—almost the size of another University of Oregon—with more than 19,100 of those just in the last five years.

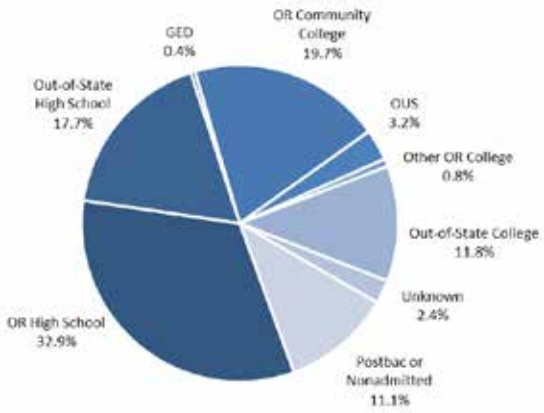
Campus Enrollment and Strategies

Fall 2012 produced all-time highs in enrollment for three of Oregon's public universities and OSU-Cascades in Bend. **Eastern Oregon University's** headcount enrollment fell 2.1%, but their FTE fell only slightly; **Oregon Institute of Technology** increased by 2.3%; **Western Oregon Universit**y enrollment fell half a percentage point; **Oregon State University's** growth of 4.8% represents increases in students in engineering fields and international students ; enrollment at the **OSU-Cascades** campus in Bend grew by 4.8% which followed a 12.7% increase in 2011; **Portland State University** enrollment dropped slightly by .8%; **Southern Oregon University** fell by 3.9% after large increases in recent years; and the **University of Oregon increased by .6 %,** with strong growth among international students. Campus strategies to increase enrollment and degree production include targeted recruitment to high-demand career paths, outreach to underserved populations such as students of color, improved delivery such as through distance education, advising, tutoring, and other student success strategies. The OUS Chancellor's Office has set aside a portion of the System budget for the past five years as **performance-based funding in order to move the state forward collectively in addressing student success in areas such as retention and degrees**.

Enrollment Growth by Student Demographics

Enrollment of Oregon residents dipped slightly to 70,787in fall 2012, a decrease of 1,031 students from 2011with **new resident undergraduates** decreasing slightly (.8%) overall. **Non-resident students** increased by 7.4% in fall 2012 to 30,606 students, with some of this attributed to other states raising tuition, cutting course offerings, and capping enrollment. Out-of-state and international students continued to be attracted to OUS's quality institutions and diverse program offerings.

Source of OUS Undergraduates, Fall 2012



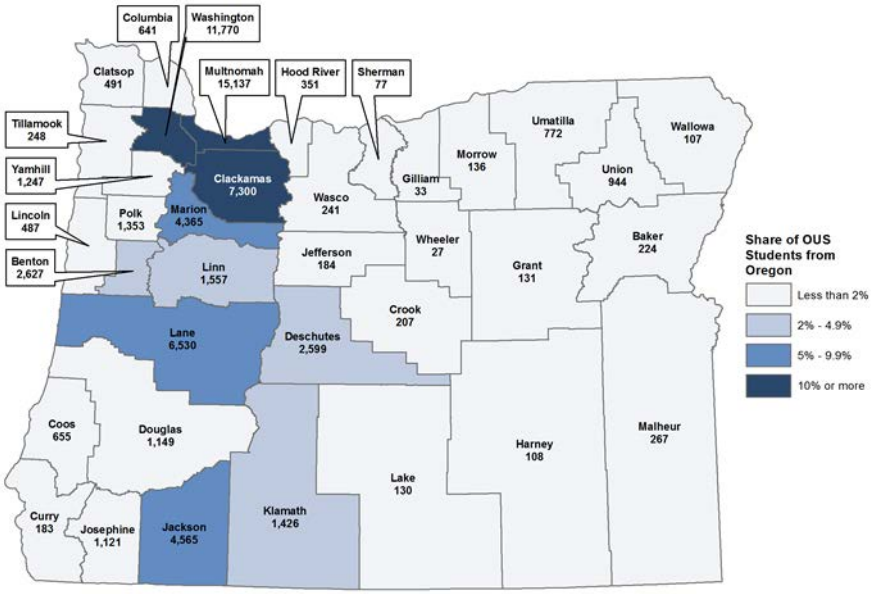
Undergraduate enrollment increased 1.6% to 85,494 students in fall 2012, fed primarily by the growth in incoming transfer students. The number of **new transfer students** was up 1.0% in fall 2012, representing the fifth straight year of growth in incoming transfer students; the enrollment of new transfer students has grown by 40% since Fall 2002. Oregon's community colleges contribute more than half of the new transfers who enter OUS in the fall, facilitated by the growth in degree partnership programs, articulation agreements, and other innovative tools such as the Oregon Transfer Module.

Graduate student enrollment decreased 1.8% to 15,899 students in fall 2012, compared to 16,190 students in fall 2011, though doctoral enrollment grew 4.1%.

Students of color increased to 20.3% within OUS in fall 2012, up from 19.2% in 2011. Hispanic/Latino students had the largest percentage enrollment growth among ethnic groups, increasing 8.6% from fall 2011 to fall 2012. **International student enrollment** grew by 17.5% in fall 2012 to an all-time high of 7,543 students, easily surpassing last year's all-time high. Students from China accounted for much of the growth, with 945 additional Chinese students enrolled, primarily at OSU and UO.

Oregon's high schools have seen the end of a period of sustained growth, and total **high school graduates are projected to decline slightly then hold steady** in coming years. However, a larger proportion of graduates will be Hispanic/Latino, a population with historically low college participation, and a lower percentage of high school graduates will be White/Caucasian.[1] **Successful access and degree completion for all Oregonians requires that enrollment growth be reinforced by a diverse set of academic and other support systems that will enable all Oregonians to persist in college and earn a degree.**

Enrollment by Oregon County at Time of Entry
Fall 2012 Headcount



[1] Knocking at the College Door, Projections of High School Graduates, Oregon, WICHE.

Oregon University System

2013 Legislative Issue Brief Higher Education

THE BENEFITS OF A COORDINATED, STATEWIDE HIGHER EDUCATION APPROACH IN OREGON

The public university system was created by the Oregon legislature in 1929 to make it easier for students to move through universities and graduate with the skills and competencies Oregon employers need. The system is the operations and academic "glue" between the seven universities and its education partners, **ensuring Oregon meets its 40-40-20 education goals.** It creates efficiencies, economies of scale and innovative programs that make college more affordable and more relevant for the realities of today's world. It saves money for Oregon taxpayers, avoids duplication of costly programs and provides unbiased information to policymakers on the most important higher education issues.

Benefits of Oregon's public university system include:

1. **Saves Taxpayer and Students Money and Ensures Accountability**. The system provides efficiencies, eliminates redundancy, and leverages economies of scale to ease the financial strain on students and Oregon taxpayers. Rather than have seven separate administrative functions at each of the campuses, OUS bundles or shares functions for many operational areas that save millions of dollars every biennium.
2. **Helps Achieve the 40-40-20.** OUS' unified, statewide focus creates efficiencies in the system and more capacity for students, drives new teaching and learning innovations, and provides direction and incentives for universities to collaborate and align programs, necessary to create the scale of change required to increase the degrees we need to meet Oregon's workforce and economic needs, and reach our 40-40-20 goal.
3. **Accelerates students ' path to college degrees.** The system spearheads partnerships with community colleges and high schools to make getting degrees faster and easier for students. Students' transfer process from community colleges is simplified with transfer degrees, dual enrollment options, new reverse transfer degrees, Applied Baccalaureate and others. Partnerships with K-12 include dual credit and aligned academic standards between high schools and OUS to lower tuition costs, and ensure more students are ready to succeed in college.
4. **Promotes Collaboration Among Public Universities.** The system builds on the individual strengths of each university and campus and harnesses the benefits of collaboration to increase efficiencies and effectiveness. Examples include Signature Research Centers like ONAMI, ORTRADI, and Oregon BEST, and the Life Sciences Collaborative with OHSU. For students, OUS creates consolidated admissions tours, common Transfer Days with community colleges, collaborative academic programs and coordinated outreach and information about university, program and financial options.
5. **Secures Substantial Federal and Private Funding.** The system brings in millions of federal and private grant funds that are available exclusively to statewide higher education systems. These include GEAR UP, College Access Challenge Grant, Common Core State Standards, Reverse Transfer, and Degree Qualifications Profiles. This biennium, these grants have brought in more than $11 million in new dollars for Oregon's student success initiatives.

6. **Provides Centralized Coordination for Vital Policies and Programs.** OUS provides coordination from a single source with other education sectors and state partners such as the Department of Education, Community Colleges and Workforce Development, Veterans Affairs, Government to Government, MWESB, Economic Development, and Public Safety. Initiatives and outcomes include the Oregon Diploma, alignment of graduation requirements and admissions requirements, ease of transfer, provision of veterans' services at campuses, and policy and programs coordinated to increase MWESB contracting.
7. **Offers a Single Unified Voice to Policymakers in Salem.** OUS provides streamlined information and focused advocacy to policymakers regarding an array of higher education issues, including operating and capital construction budget requests. This centralized, unified voice saves valuable time and public resources that the Governor, Legislators, and their staffs would otherwise have to devote to mastering and coordinating the working details of each of the seven campuses.

OREGON UNIVERSITY SYSTEM

POCKET FACT BOOK

2012

Eastern Oregon University • Oregon Institute of Technology
Oregon State University • Oregon State University - Cascades
Portland State University • Southern Oregon University
University of Oregon • Western Oregon University
Oregon Health & Science University - Affiliated

This Pocket Fact Book contains selections from the full Oregon University System 2012 Fact Book which is available for download at www.ous.edu/factreport/factbook.

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Oregon University System
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Cover: Photograph courtesy of Southern Oregon University

Table of Contents

Oregon University System Overview

The Oregon University System (OUS), comprised of seven public universities and one branch campus, is overseen by the 12-member Oregon State Board of Higher Education appointed by the Governor. The Chancellor is the chief executive and administrative officer at OUS, and reports to the Board.

Chancellor's Office
Melody Rose, Interim Chancellor
melody_rose@ous.edu
p. (503) 725-5707

Government Relations
Bridget Burns, Chief of Staff
bridget_burns@ous.edu
p. (503) 725-5735

Communications & Public Affairs
Diane Saunders, Director of Communications
diane_saunders@ous.edu
p. (503) 725-5714

OUS Campuses

Eastern Oregon University (EOU)
Dr. Bob Davies, President
www.eou.edu p. (541) 962-3672

Oregon Institute of Technology (OIT)
Dr. Christopher Maples, President
www.oit.edu p. (541) 885-1000

Oregon State University (OSU)
Dr. Edward Ray, President
www.oregonstate.edu p. (541) 737-0123

Portland State University (PSU)
Dr. Wim Wiewel, President
www.pdx.edu p. (503) 725-3000

Southern Oregon University (SOU)
Dr. Mary Cullinan, President
www.sou.edu p. (541) 552-7672

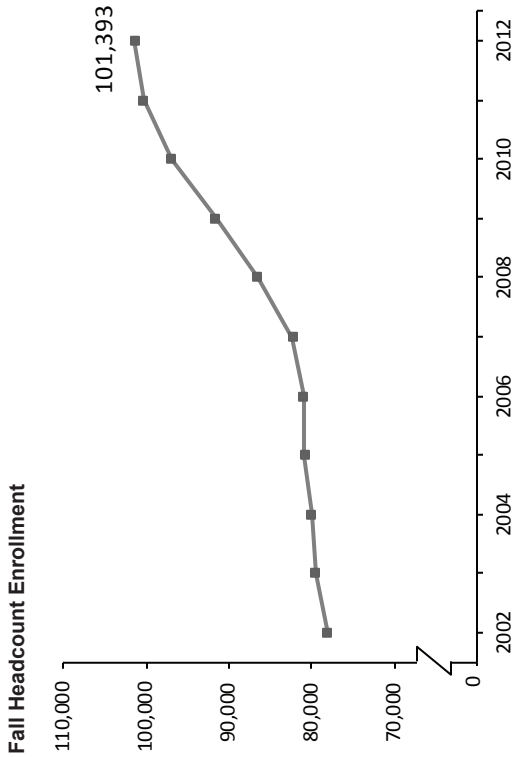
University of Oregon (UO)
Dr. Michael Gottfredson, President
www.uoregon.edu p. (541) 346-1000

Western Oregon University (WOU)
Mark Weiss, President
www.wou.edu p. (503) 838-8000

Fall Headcount, 2002 through 2012

	EOU	OIT	OSU Corv.	OSU Casc.	PSU	SOU	UO	WOU	Total
2002	3,418	3,139	18,774	387	21,841	5,478	20,044	5,030	78,111
2003	3,287	3,236	18,974	373	23,117	5,505	20,034	5,032	79,558
2004	3,338	3,373	19,159	438	23,486	5,161	20,339	4,772	80,066
2005	3,533	3,351	19,236	491	24,015	4,989	20,394	4,879	80,888
2006	3,425	3,157	19,362	495	24,284	5,002	20,388	4,889	81,002
2007	3,433	3,318	19,753	497	24,999	4,836	20,376	5,037	82,249
2008	3,666	3,525	20,320	510	26,587	5,082	21,507	5,349	86,546
2009	3,957	3,927	21,969	611	27,972	5,104	22,386	5,654	91,580
2010	4,137	3,797	23,761	678	28,522	6,443	23,389	6,233	96,960
2011	4,298	3,911	24,977	764	28,958	6,744	24,447	6,217	100,316
2012	4,208	4,001	26,393	801	28,731	6,481	24,591	6,187	101,393

Headcount includes all extended enrollment. Source: OUS Institutional Research.

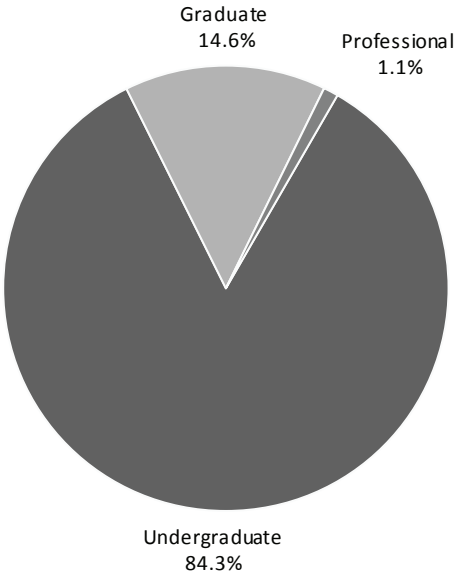


Enrollment by Student Level
Fall 2012 Headcount

Student Level	Headcount
Freshman	15,799
Sophomore	14,668
Junior	19,682
Senior	25,839
Postbaccalaureate Nongraduate	3,260
Nonadmit Undergraduate	6,246
Subtotal Undergraduate	85,494
Master's	8,617
Doctoral	3,262
Other Graduate	520
Nonadmit Graduate	2,417
Subtotal Graduate	14,816
Law	495
Pharmacy	365
Veterinary Medicine	223
Subtotal Professional	1,083
Grand Total	101,393

Source: OUS Institutional Research.

Enrollment by Student Level
Fall 2012



Enrollment by Student Level and Fee Category
Fall 2012 Headcount

Institution	Resident	Nonresident	Total
Eastern Oregon University			
Undergraduate	2,961	884	3,845
Graduate	308	55	363
Total	3,269	939	4,208
Oregon Institute of Technology			
Undergraduate	3,569	401	3,970
Graduate	26	5	31
Total	3,595	406	4,001
Oregon State University- Corvallis			
Undergraduate	16,065	5,749	21,814
Graduate	2,943	1,048	3,991
Professional	450	138	588
Total	19,458	6,935	26,393
Oregon State University- Cascades			
Undergraduate	621	41	662
Graduate	128	11	139
Total	749	52	801
Portland State University			
Undergraduate	19,851	3,319	23,170
Graduate	4,633	928	5,561
Total	24,484	4,247	28,731

Institution	Resident	Nonresident	Total
Southern Oregon University			
Undergraduate	4,446	1,371	5,817
Graduate	582	82	664
Total	5,028	1,453	6,481
University of Oregon			
Undergraduate	12,257	8,572	20,829
Graduate	2,442	825	3,267
Professional (Law)	189	306	495
Total	14,888	9,703	24,591
Western Oregon University			
Undergraduate	4,400	987	5,387
Graduate	745	55	800
Total	5,145	1,042	6,187
Total			
Undergraduate	64,170	21,324	85,494
Graduate	11,807	3,009	14,816
Professional	639	444	1,083
Total	76,616	24,777	101,393

Source: OUS Institutional Research.

Enrollment by Racial/Ethnic Group, Fall 2012 Headcount

Institution	American Indian or Alaska Native	Asian	Black or African American	Hispanic, Any Race	Native Hawaiian or Pacific Islander
EOU	95	107	90	246	54
OIT	50	202	52	275	21
OSU-Corv.	214	1,742	334	1,686	111
OSU-Casc.	10	8	7	51	2
PSU	413	2,123	868	2,224	165
SOU	94	113	102	428	38
UO	171	1,285	451	1,637	137
WOU	111	158	205	601	138
Total	1,158	5,738	2,109	7,148	666
Percentage of OUS Total	1.1%	5.7%	2.1%	7.0%	0.7%

Institution	Two or More Races	Minority Subtotal	White	Nonres Alien	Unknown	Total
EOU	18	610	3,381	58	159	4,208
OIT	184	784	3,040	34	143	4,001
OSU-Corv.	1,117	5,204	17,600	2,362	1,227	26,393
OSU-Casc.	32	110	622	3	66	801
PSU	1,051	6,844	18,538	2,007	1,342	28,731
SOU	179	954	3,723	137	1,667	6,481
UO	1,102	4,783	16,496	2,656	656	24,591
WOU	56	1,269	4,440	286	192	6,187
Total	3,739	20,558	67,840	7,543	5,452	101,393
Percentage of OUS Total	3.7%	20.3%	66.9%	7.4%	5.4%	

Race/ethnicity reporting methodology changed in 2010 consistent with new federal guidelines: (1) Hispanic ethnicity is now collected separately from race and takes precedence for reporting purposes; (2) Asian and Native Hawaiian/Pacific Islander are now distinct categories; and (3) There is now a separate category for non-Hispanic students who identify with two or more races.
Source: OUS Institutional Research.

Enrollment of Oregon Students by Oregon County, Fall 2012 Headcount

County	Total
Baker	224
Benton	2,627
Clackamas	7,300
Clatsop	491
Columbia	641
Coos	655
Crook	207
Curry	183
Deschutes	2,599
Douglas	1,149
Gilliam	33
Grant	131
Harney	108
Hood River	351
Jackson	4,565
Jefferson	184
Josephine	1,121
Klamath	1,426
Lake	130

County	Total
Lane	6,530
Lincoln	487
Linn	1,557
Malheur	267
Marion	4,365
Morrow	136
Multnomah	15,137
Polk	1,353
Sherman	77
Tillamook	248
Umatilla	772
Union	944
Wallowa	107
Wasco	241
Washington	11,770
Wheeler	27
Yamhill	1,247
Unknown County	1
Total	69,391

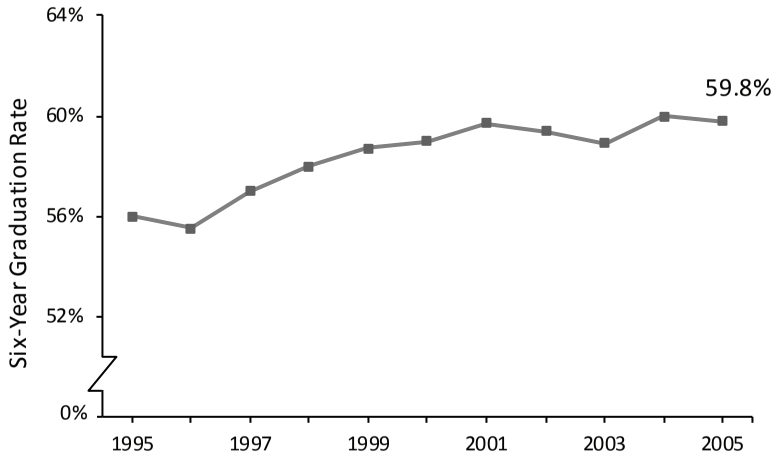
Source: OUS Institutional Research.

Oregon Freshman Participation Rate in OUS 1996-97 through 2012-13

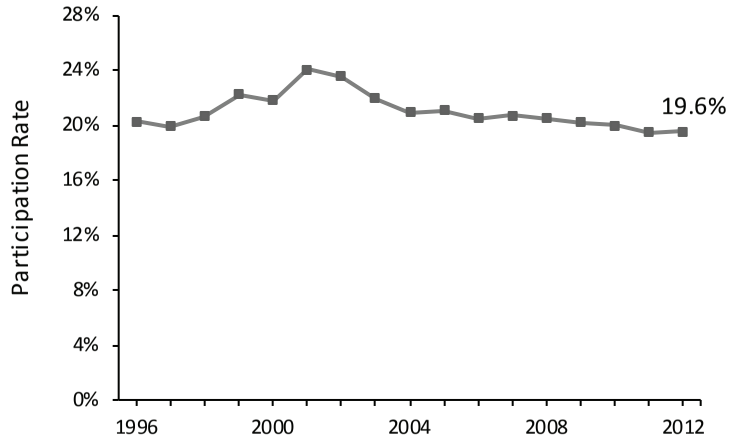
	Oregon High School Grads Previous Year	OUS First-Time Freshmen From an Oregon High School	Rate (percent)[1]
1996-97	29,411	5,950	20.2
1997-98	30,671	6,110	19.9
1998-99	30,928	6,371	20.6
1999-00	31,548	7,010	22.2
2000-01	33,813	7,368	21.8
2001-02	33,575	8,081	24.1
2002-03	34,987	8,247	23.6
2003-04	36,506	8,004	21.9
2004-05	37,056	7,756	20.9
2005-06	36,650	7,722	21.1
2006-07	37,203	7,628	20.5
2007-08	37,602	7,785	20.7
2008-09	39,304	8,040	20.5
2009-10	39,529	7,976	20.2
2010-11	39,092	7,808	20.0
2011-12	39,128	7,623	19.5
2012-13[2]	38,167	7,469	19.6

[1] Ratio of OUS first-time freshmen from Oregon high schools to Oregon high school graduates of the previous school year.
[2] 2012-13 high school graduates are based on projections.
Sources: (1) OUS Institutional Research, (2) Oregon Department of Education.

Six-Year Graduation Rate of OUS Entering Freshmen, 1995 through 2005



Oregon Freshman Participation Rate in OUS 1996-97 through 2012-13



Achievement Compact with OEIB - OUS Summary

Outcomes: Oregonians Only	2010-11			2011-12 Projected			2012-13 Targets		
		Disadvantaged[1]			Disadvantaged[1]			Disadvantaged[1]	
	All	URM	Pell	All	URM	Pell	All	URM	Pell
Completion									
Bachelor's degrees	11,132	1,063	5,511	11,917	1,138	5,900	12,529	1,196	6,203
Bachelor's degrees to rural students	1,487	147	883	1,548	153	919	1,639	162	973
Advanced degrees	2,976	239	-	2,803	225	-	2,788	224	-
Quality									
Employer satisfaction	Future Submission			Future Submission			Future Submission		
Alumni satisfaction	Future Submission			Future Submission			Future Submission		

Six-Year Graduation Rate of OUS Entering Freshmen Fall Cohort, 1995 through 2005

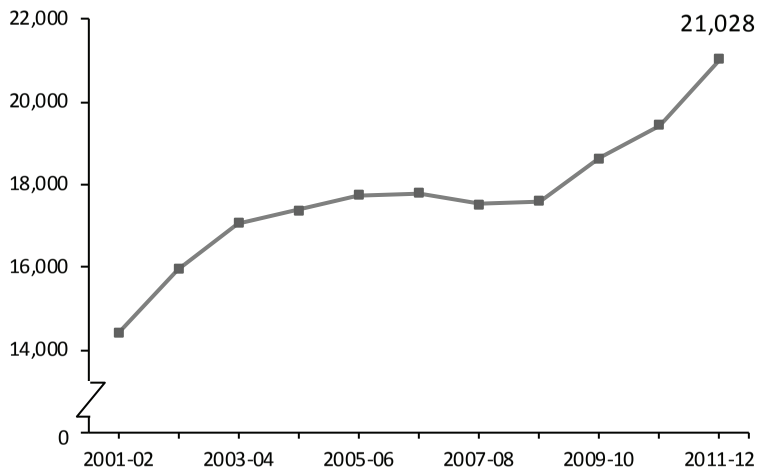
Cohort	EOU	OIT	OSU	PSU	SOU	UO	WOU	Total
1995	46.8%	40.8%	63.7%	37.1%	43.3%	62.2%	51.6%	56.0%
1996	37.4%	47.0%	63.7%	39.3%	43.1%	61.8%	53.2%	55.5%
1997	42.9%	48.2%	65.1%	40.4%	45.3%	63.8%	54.4%	57.0%
1998	45.1%	48.0%	64.8%	41.4%	45.1%	65.8%	52.9%	58.0%
1999	41.8%	46.4%	65.1%	39.3%	49.6%	66.6%	54.8%	58.7%
2000	40.2%	46.1%	65.0%	41.9%	49.0%	66.4%	54.3%	59.0%
2001	37.5%	50.2%	65.6%	39.1%	46.4%	68.7%	56.2%	59.7%
2002	38.6%	50.6%	66.7%	39.3%	45.4%	69.6%	48.6%	59.4%
2003	43.9%	49.1%	64.8%	37.9%	40.7%	73.8%	49.2%	58.9%
2004	42.8%	49.2%	65.3%	42.5%	42.7%	71.2%	50.2%	60.0%
2005	45.6%	50.8%	65.2%	42.6%	44.7%	70.3%	48.3%	59.8%

Freshmen began college at the institution shown. They are counted as completers as long as they graduated from any OUS institution.
Source: OUS Institutional Research.

Outcomes: Oregonians Only	2010-11			2011-12 Projected			2012-13 Targets		
		Disadvantaged[1]			Disadvantaged[1]			Disadvantaged[1]	
	All	URM	Pell	All	URM	Pell	All	URM	Pell
Connections									
New freshmen with early college credit	3,308	476	1,194	3,321	529	1,189	3,332	532	1,200
	42%	36%	39%	44%	38%	40%	44%	38%	41%
Bachelor's degrees to OR CC transfers	3,269	384	2,106	3,573	420	2,302	3,748	440	2,414

[1] A student is defined as being disadvantaged per OEIB 705-0010-0040 by being either a member of an under-represented racial or ethnic group and/or eligible to receive a Pell Grant. The Federal Pell Grant is a need-based grant from the federal government intended for undergraduate students who have not earned a bachelor's degree; eligibility is subject to change by criteria set forth by the federal government. For this report, only Pell recipients are counted. Students self-identify both race and ethnicity. Inclusion in the multi-racial category is determined by identification with more than one race and inclusion of one or more of the underrepresented groups. A student may be a member of both an underrepresented minority group and be Pell eligible.

Degrees Awarded, 2001-02 through 2011-12



Degrees Awarded by Institution 2001-02 through 2011-12

	EOU	OIT	OSU	PSU	SOU	UO	WOU	OHSU	Grand Total
2001-02	458	360	3,459	3,488	1,030	4,010	924	683	14,412
2002-03	580	369	3,894	3,928	985	4,534	984	670	15,944
2003-04	660	410	4,113	4,390	1,073	4,593	1,110	721	17,070
2004-05	607	496	4,213	4,496	1,005	4,839	1,038	689	17,383
2005-06	611	461	4,290	4,528	1,036	5,036	1,012	757	17,731
2006-07	673	492	4,222	4,819	986	4,999	925	669	17,785
2007-08	701	438	4,232	4,840	923	4,825	938	627	17,524
2008-09	633	495	4,254	4,970	896	4,693	1,003	652	17,596
2009-10	685	497	4,490	5,207	1,000	5,036	1,005	710	18,630
2010-11	627	538	4,538	5,784	1,006	5,130	1,071	743	19,437
2011-12	726	572	5,052	6,039	1,002	5,589	1,229	819	21,028

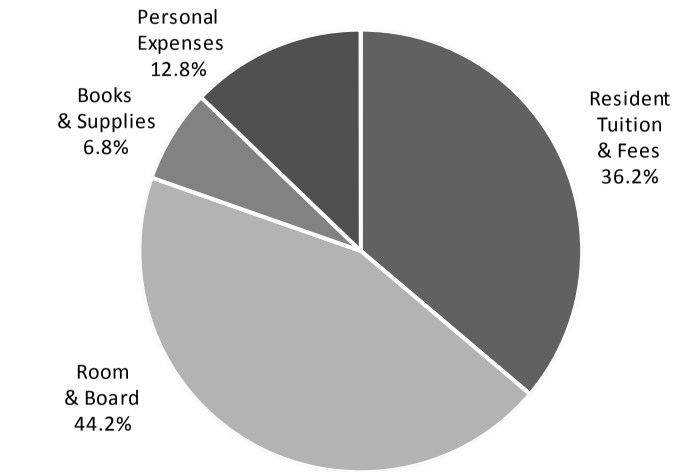
Degree totals include bachelor's, master's, doctoral, and professional degrees, and do not include associate's degrees or certificates.
Sources: OUS Institutional Research, IPEDS Completions Surveys.

Summary of Degrees and Certificates Awarded, 2011-12

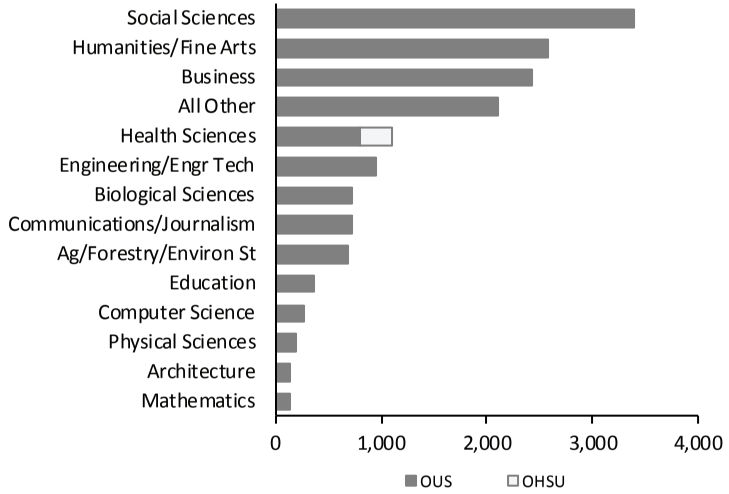
Institution	Assoc.	Bac.	Mas.	Doc.	Prof.	Cert.[1]	Total
EOU	8	619	107	-	-	100	834
OIT	49	564	8	-	-	12	633
OSU	-	3,929	774	205	144	326	5,378
PSU	-	4,320	1,654	65	-	696	6,735
SOU	-	770	232	-	-	261	1,263
UO	-	4,272	986	170	161	325	5,914
WOU	-	1,018	211	-	-	180	1,409
OUS Total	57	15,492	3,972	440	305	1,900	22,166
OHSU	-	305	256	57	201	139	958
Grand Total	57	15,797	4,228	497	506	2,039	23,124

[1] Certificate counts consist primarily of teacher education certificates and postbaccalaureate awards.
Sources: OUS Institutional Research, IPEDS Completions Survey.

Average Student Budget, 2012-13



Bachelor's Degrees Awarded by Discipline, 2011-12



Resident Undergraduate Tuition and Fee Rates[1] 1992-93 through 2012-13

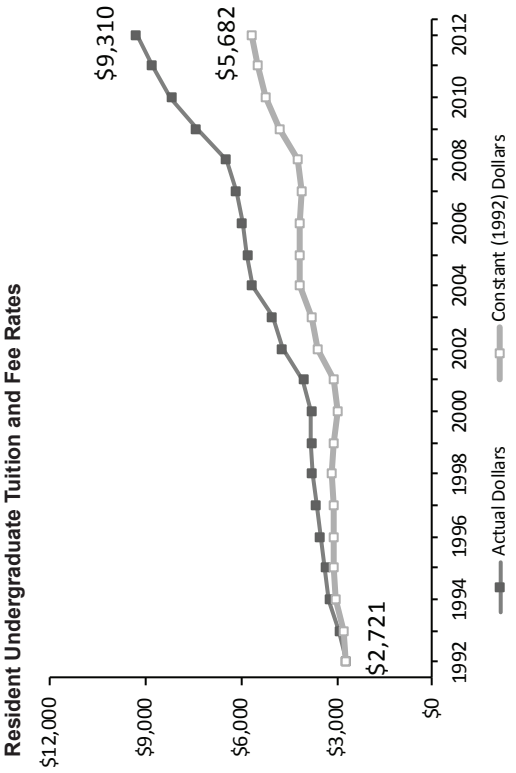
Year	Actual Dollars	Constant (1992) Dollars	Year	Actual Dollars	Constant (1992) Dollars
1992-93	$2,721	$2,721			
1993-94	2,916	2,817	2003-04	$5,039	$3,781
1994-95	3,258	3,059	2004-05	5,670	4,148
1995-96	3,381	3,085	2005-06	5,805	4,141
1996-97	3,540	3,120	2006-07	5,970	4,150
1997-98	3,648	3,110	2007-08	6,168	4,135
1998-99	3,771	3,155	2008-09	6,485	4,209
1999-00	3,810	3,086	2009-10	7,430	4,817
2000-01	3,819	2,999	2010-11	8,190	5,244
2001-02	4,071	3,120	2011-12	8,789	5,471
2002-03	4,723	3,592	2012-13	9,310	5,682

[1] Tuition rates for the University of Oregon are used in this table.
Source: OUS Institutional Research.

Resident Undergraduate Student Budget 2012-13 Academic Year

Institution	Resident Tuition & Fees	Room & Board	Books & Supplies	Personal Expenses	Total
EOU	$7,238	$8,289	$1,350	$2,634	$19,511
OIT	8,308	8,694	1,100	3,080	21,182
OSU - Corv.	8,138	10,074	1,908	2,616	22,736
OSU - Casc.	6,855	10,074	1,908	2,616	21,453
PSU	7,653	11,019	2,028	3,240	23,940
SOU	7,521	9,651	900	2,685	20,757
UO	9,310	10,260	1,050	2,430	23,050
WOU	7,989	8,880	1,650	2,982	21,501
Average	$7,877	$9,618	$1,487	$2,785	$21,766

Student budgets are based on full-time enrollment at 15 credit-hours/term and do not include non-mandatory fees or special program-specific fees. Actual budgets will vary depending upon program of study, dependency status, and housing situations.
Sources: (1) Tuition and fees: OUS Budget Operations, Academic Year Fee Book, 2012-13. (2) Other data: OUS College Counselor Handbook.

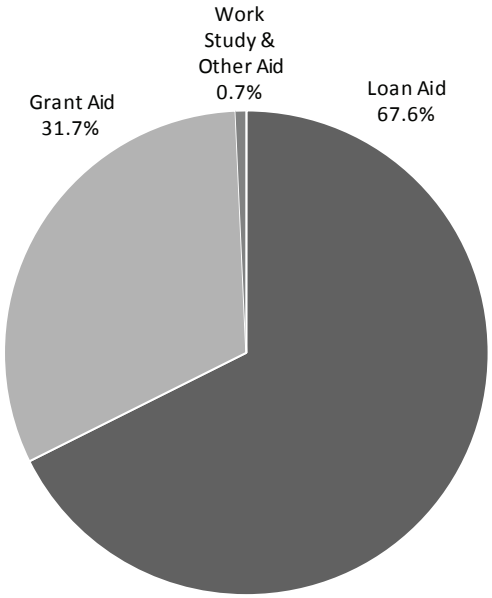


Financial Aid by Aid Program, 2010-11 (Dollars in Millions)

	Students Served[1]	Total Outlay Undergrad	Total Outlay All
Loans			
Fed Subsidized Loans	45,035	$153.9	$208.3
Fed Unsubsidized Loans	44,002	162.4	230.0
Fed Perkins Loans	5,450	7.7	7.8
Parent PLUS Loans	9,458	96.4	114.0
Univ/Outside Loans	2,819	25.1	26.4
Subtotal: Loan Aid	53,344	445.6	586.6
Grants			
Pell Grants	31,029	120.8	120.8
Other Fed Grants	9,712	12.4	14.5
Oregon Opp Grants	6,216	9.7	9.7
State/Lottery Grants	993	2.0	2.3
Other Grants/Schol	15,534	53.7	65.3
Fee Remissions	23,476	56.0	62.0
Subtotal: Grant Aid	49,617	254.6	274.6
Work Study	3,845	5.1	5.5
Other Aid	386	0.6	0.7
Grand Total	69,769	$705.8	$867.4

Student counts and outlay are based on the academic year (summer through spring). Excludes graduate fee remissions.
[1] In 2010-11, 54.4% of the students attending an OUS institution received some form of aid (69,769 out of 128,161 students.)
Source: OUS Institutional Research.

Financial Aid by Aid Type, 2010-11



Ranked Instructional Faculty by Full-Time/Part-Time Status 2011-12 Headcount

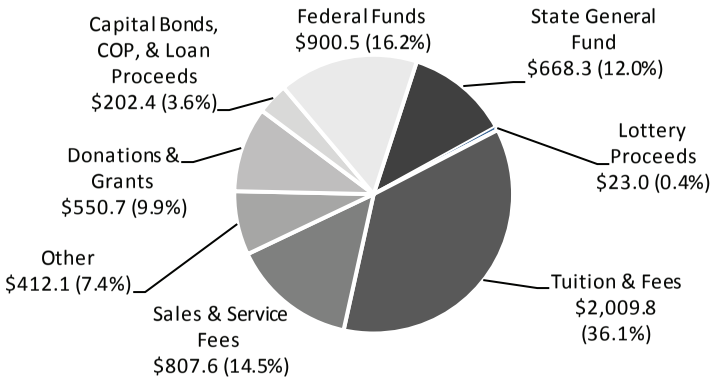
Institution	All Ranks Full-Time N	Full-Time %	Part-Time N	Part-Time %	Total
Eastern Oregon University	105	92.1%	9	7.9%	114
Oregon Institute of Technology	134	91.8%	12	8.2%	146
Oregon State University	810	74.7%	274	25.3%	1,084
Portland State University	700	48.5%	742	51.5%	1,442
Southern Oregon University	209	83.9%	40	16.1%	249
University of Oregon	833	72.8%	311	27.2%	1,144
Western Oregon University	201	51.0%	193	49.0%	394
Total	2,992	65.4%	1,581	34.6%	4,573

Source: OUS Institutional Research.

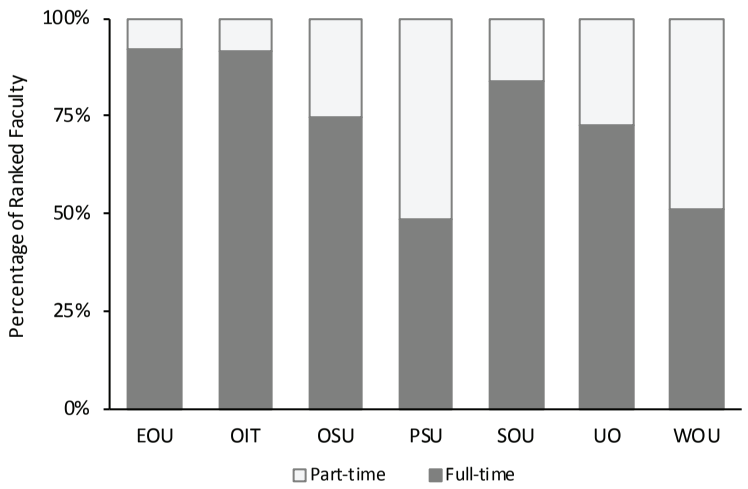
2011-13 OUS Biennial Budget, Source of Funds

Total = $5,574.2 (Dollars in Millions)

Includes Capital Construction



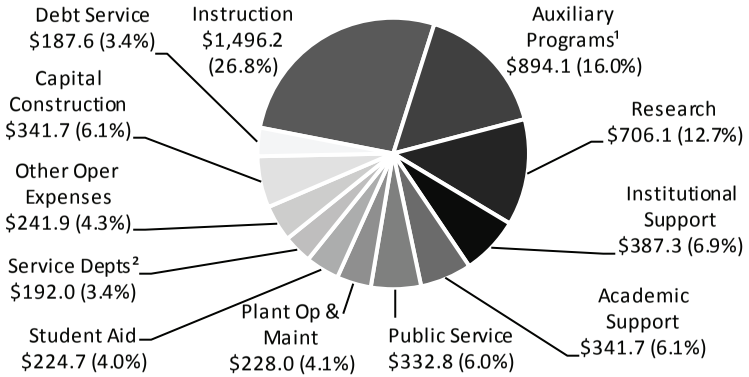
Ranked Instructional Faculty by Full-Time/Part-Time Status, 2011-12



2011-13 OUS Biennial Budget, Use of Funds (Dollars in Millions)

Includes Capital Construction

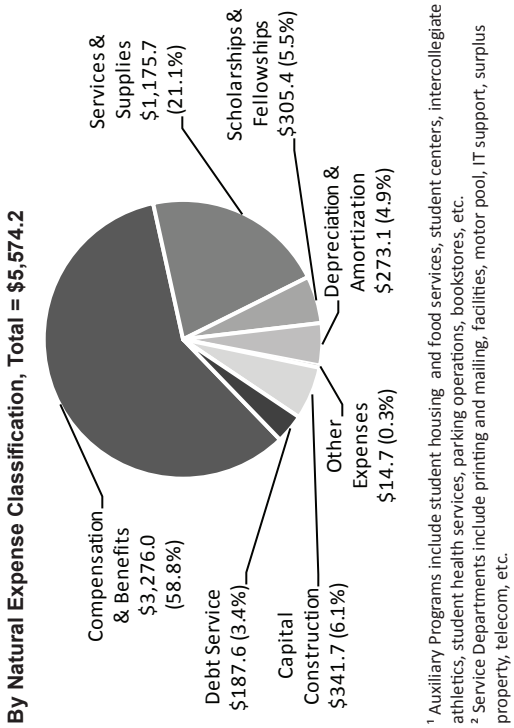
By Functional Expense Classification, Total = $5,574.2



Average Salaries of Full-Time Instructional Faculty (Dollars in Thousands), 2011-12

Institution	Professor	Associate Professor	Assistant Professor	Instructor	All Ranks[1]
EOU	$67.2	$58.7	$49.4	$40.1	$58.0
OIT	72.3	59.4	49.5	43.9	60.2
OSU	99.9	77.8	71.6	45.0	82.0
PSU	92.8	73.6	60.3	41.7	74.7
SOU	73.1	59.8	50.4	43.0	60.8
UO	112.3	79.6	74.0	47.7	87.8
WOU	69.0	54.5	42.5	35.9	55.0

[1] All-ranks average salary assumes a distribution of 35% professors, 30% associate professors, 30% assistant professors, and 5% instructors.
Source: American Association of University Professors, ACADEME, The Annual Report on the Economic Status of the Profession, 2011-12.



[1] Auxiliary Programs include student housing and food services, student centers, intercollegiate athletics, student health services, parking operations, bookstores, etc.
[2] Service Departments include printing and mailing, facilities, motor pool, IT support, surplus property, telecom, etc.

2011-13 OUS Biennial Budget (Dollars in Millions)

	State General Funds	Lottery Funds
Education and General Program		
EOU	$26.5	$0.7
OIT	30.5	0.7
OSU-Corvallis	147.9	2.0
OSU-Cascades	8.3	-
PSU	108.6	1.7
SOU	25.8	0.7
UO	90.0	2.1
WOU	27.1	0.9
Chancellor's Office	10.8	-
Ind Affrs/OMI/ETIC/Other[2]	11.1	-
Subtotal	486.5	8.6
Statewide Public Services		
Ag Experiment Station	51.8	-
Extension Service	37.5	-
Forest Research Lab	5.7	-
Subtotal	95.0	-
Debt Service	86.8	14.4
Capital Construction	-	-
Total Budget	$668.3	$23.0

[1] Includes legislative actions through February 2012 and Emergency Board actions through June 2012.
[2] Includes $3.25 million in reserve incentive funding.

E&G Other Funds	Other Funds	Total All Funds[1]
$40.2	$40.4	$107.8
42.7	40.4	114.2
562.6	691.0	1,403.5
8.9	0.6	17.8
428.3	456.8	995.4
73.4	83.3	183.2
735.3	773.1	1,600.5
79.4	98.7	206.0
8.5	22.0	41.3
-	-	11.1
1,979.3	2,206.3	4,680.7
11.3	90.5	153.6
23.9	10.4	71.8
8.1	23.7	37.5
43.4	124.6	263.0
-	187.6	288.8
-	341.7	341.7
$2,022.7	$2,860.2	$5,574.2

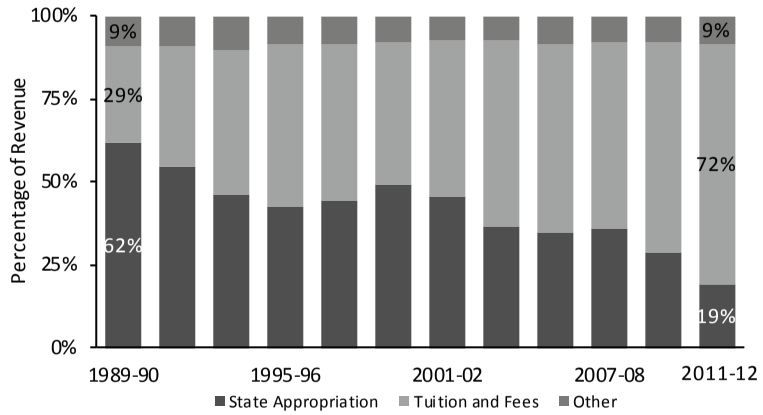
Source: OUS Budget Operations

OUS Revenue per Student FTE, 1989-90 through 2011-12

Fiscal Year	Tuition and Fees Amount	%	State Appropriation Amount	%	Other E&G Funds Amount	%	Total Amount
1989-90	$1,990	29%	$4,292	62%	$659	9%	$6,941
1991-92	2,797	36%	4,247	55%	714	9%	7,758
1993-94	3,736	43%	4,038	47%	903	10%	8,677
1995-96	3,881	48%	3,454	43%	716	9%	8,051
1997-98	4,000	47%	3,793	44%	735	9%	8,528
1999-00	3,990	43%	4,543	49%	722	8%	9,255
2001-02	4,453	47%	4,375	46%	725	8%	9,553
2003-04	5,508	56%	3,619	37%	744	8%	9,871
2005-06	6,306	57%	3,858	35%	930	8%	11,094
2007-08	7,125	56%	4,606	36%	1,026	8%	12,757
2009-10	8,362	64%	3,761	29%	1,024	8%	13,147
2011-12	9,842	72%	2,633	19%	1,171	9%	13,646

For comparison purposes only. Does not factor in cost differentials between resident and non-resident students. Data excludes OSU Statewide Public Services, OHSU, and Chancellor's Office/Industry Affairs/OMI/ETIC/OCKED/Other.

State/Student Share of OUS Revenue per Student FTE



Source: OUS Budget Operations.

OUS Share of State General Fund Appropriation 1987-89 through 2011-13 (Dollars In Millions)

Biennium	State of Oregon Total General Fund	OUS Operations	OUS %
1987-89	$3,703.6	$565.2	15.3%
1989-91	4,535.7	572.3	12.6%
1991-93	5,515.4	588.4	10.7%
1993-95	6,411.3	549.8	8.6%
1995-97	7,408.0	503.2	6.8%
1997-99	8,805.5	608.1	6.9%
1999-01	10,129.1	754.9	7.5%
2001-03	9,674.2	745.8	7.7%
2003-05	10,295.5	671.4	6.5%
2005-07	11,640.6	736.9	6.3%
2007-09	12,964.5	847.2	6.5%
2009-11	12,910.1	800.5	6.2%
2011-13	13,921.0	668.3	4.8%

2007-09 and 2009-11 include ARRA funds as General Fund offset. Source: OUS Budget Dept.

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Oregon University System

DIVERSE CAMPUS MISSIONS OF OUS INSTITUTIONS:

BACKGROUND DOCUMENTS

Wednesday, March 20, 2013

Quick Facts on Oregon's Public Research Universities

Numbers…

Enrollment Fall 2012 headcount	79,715	OSU	26,393
		PSU	28,731
		UO	24,591
Degrees & certificates awarded 2011-12	18,027	OSU	5,378
		PSU	6,735
		UO	5,914
Faculty 2011-12 headcount	3,670	OSU	1,084
		PSU	1,442
		UO	1,144
Sponsored activity FY 2012	$393 M	OSU	$205 M
		PSU	$69 M
		UO	$119 M
Resident tuition & fees 2012-13, compared to peer average	17% below	OSU	20% below
		PSU	18% below
		UO	9% below

Oregon's rank among the 50 states…

Total federal R&D expenditures in public universities FY 2010 (includes OHSU)	17th
Total federal R&D per faculty in public universities FY 2010 (includes OHSU)	7th
Faculty salary 2011-12 public doctoral universities	45th
Faculty compensation 2011-12 public doctoral universities	29th

Sources: Oregon University System, *Fact Book 2012*; U.S. Dept of Education, *Digest of Education Statistics 2010*; *Chronicle of Higher Education*, Facts and Figures, Tuition and Fees 2012-13.

Oregon University System

2013 Legislative Issue Brief Higher Education

CAMPUSES SERVING THE NEEDS OF OREGON'S STATEWIDE COMMUNITIES

EOU | OIT | SOU | WOU | OSU-CASCADES

Overview

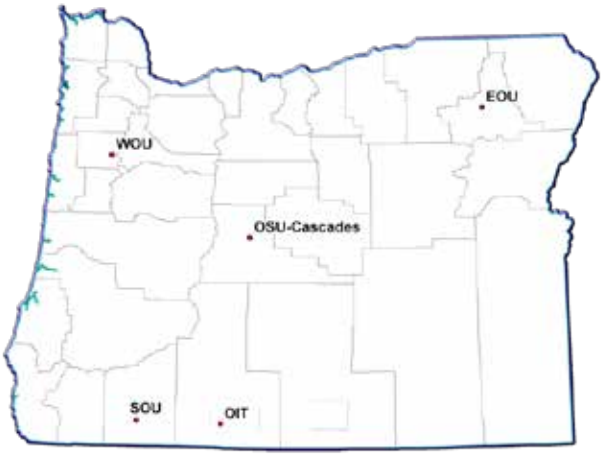
Five Oregon University System campuses—three comprehensive universities, a polytechnic institution, and a branch campus—share a particular responsibility for serving the higher education needs of and contributing to the economic vitality of smaller communities in Oregon. Eastern Oregon University, Southern Oregon University, Western Oregon University, Oregon Institute of Technology and Oregon State University Cascades contribute significantly to the educational attainment of our citizens in support of the state's 40-40-20 goal, while having positive economic, social and cultural impacts in their regions.

Bringing Education Access, Jobs and Stability to Oregon's Smaller Communities

Each of these campuses serves as its area's "local or regional university" and attracts students who wish to stay closer to home for their college experience, students who prefer the learning environment of a smaller university, and students from across Oregon, the country, and the world who are drawn to these universities' quality programs. With the intellectual capital of their faculty, students and graduates—these campuses also attract business investment that leads to the creation of new companies and jobs, and adds to the cultural vitality of each region. Their research and service functions provide direct benefits to local businesses and citizens that enrich the health of the communities in diverse ways.

Individually and collectively, these institutions help Oregon meet its educational and economic goals with:

- **Enrollment of 21,678 students** in fall 2012
- **Awarded 4,444 degrees and certificates** in 2011-12
- **Educating rural place-bound students** through campuses, centers, community college partnerships and distance education, including a **greater proportion of students with financial need** (88.1% of full time undergraduate students in these universities received financial aid compared with 76.6% for OUS as a whole).
- **Important research benefits serving communities and bringing in research dollars**, with total infusion of sponsored research and other support of almost $20 million in 2011-12 alone, an average of about $30,000 per full time faculty member (does not include OSU-Cascades which is counted as part of OSU's total).
- EOU, OIT, SOU, and WOU and OSU-Cascades support **6,576 Oregon employees** (besides regular faculty and staff, includes graduate assistants and student employees).
- A significant economic impact in their areas, totaling **almost $500 million;** and many of these institutions are the **largest employers in their area**.



Educating Oregonians Across the State

These five campuses provide access to higher education for many Oregon students who would not otherwise go to college outside of their region. At these campuses, 85% of the students are Oregon residents, compared to 73% at OUS's three large universities. A frequent comment from rural students is that without the campus in their area, they would not attend college. These campuses are critical access points that produce a significant number of college graduates each year.

- **Eastern Oregon University** (*La Grande, Enrollment: 4,208, 71.4% resident):* EOU works with students to prepare them for the world beyond college with high-quality liberal arts and professional programs. A special focus on rural, regional and distance learning means that EOU's classes are available when and where students

need them – at its main campus, online from anywhere in the world, or onsite at 16 centers across the state. EOU enrolls a large number of the students from the 10 Eastern Oregon counties, with 1,100 students coming from Union and Umatilla County alone. Many students from the Portland area and across the state who are attracted to a small campus experience also attend EOU. The university's annual $44 million budget equates to $110 million added to promote the regional economy, with students infusing an additional $7.5 million to local commerce each year.

- **Oregon Institute of Technology** – *(Klamath Falls and Wilsonville, Enrollment 4,001, 90% resident*): Oregon Tech is Oregon's only public institution of higher education with a mission to deliver technology-based education through hands-on application. The university partners with business and industry leaders to ensure programs adapt to new technologies and workforce demands. This real-world focus gives students a competitive edge: 90 percent are employed or in graduate school within six months after graduation. Oregon Tech graduates earn excellent starting salaries. Oregon Tech has two main industry-focused campuses: a residential campus in Klamath Falls located in Southern Oregon and an urban campus in Wilsonville, on the southern perimeter of the Portland metro area. Oregon Tech offers programs primarily in engineering and health sciences and the university offers a low student to faculty ratio of 20:1. Oregon Tech's engineering programs are ABET-accredited and ranked nationally in numerous publications. The university is recognized as the first in the nation to offer a bachelor's and a master's degree in Renewable Energy Engineering (REE).
- **OSU-Cascades** *(Bend; Enrollment 801; 94% resident):* With legislative and community support, OSU-Cascades is expanding into a four-year branch campus, continuing a 2+2 partnership with Central Oregon Community College, and planning for an independent location near downtown Bend. It offers a growing number of degree programs in arts and sciences, business, education, natural resources, and engineering. Nearly all of OSU-Cascades students come from central Oregon, with the great majority from Deschutes County.
- **Southern Oregon University** (*Ashland, and Medford joint center with Rogue Community College; Enrollment: 6,481; 78% resident):* SOU provides liberal arts and sciences programs and professional programs in business, education, and performing arts; and a cooperative program in nursing. SOU's small liberal arts experience draws many of its Oregon-based student population from four Southern Oregon counties, as well as attracting many students from the population-rich Portland Metropolitan area and California.
- **Western Oregon University** *(Monmouth, Enrollment: 6,187; 83% resident):* WOU provides programs in liberal arts and sciences, professional programs in education, business, criminal justice and public services, and a cooperative program in nursing. Of WOU's Oregon-based students, a large numbers come from their region of Marion, Polk Counties and neighboring counties, as well as the Portland Metropolitan area. Significant numbers are also drawn to WOU's small campus experience from more rural areas such as Deschutes, Jackson, and Lincoln counties.

Programs and Services Helping Rural Communities

- **EOU's** Eastern Promise initiative is creating opportunities for high school students to earn college credits and/or certificates while still in high school. EOU, InterMountain ESD, BMCC and TVCC, and school districts are working together to make this program a success.
- **OIT's** Oregon Renewable Energy Center, established by the Legislature in 2001, promotes energy conservation and renewable energy use in Oregon through applied research, educational programs, and practical information; and playing a critical role as an action-oriented solutions developer to address the Northwest's energy and economic challenges.
- **OSU – Cascades'** graduate student teachers serve in K-12 schools throughout Central Oregon.
- **SOU** encourages students to be active in the community, with more than 400 classes each year including a civic engagement component.
- **WOU** provides targeted training support to rural Native American tribes in areas such as leadership development and community policing.

Fiscal Challenges of Campuses Serving Regional Needs

Continued support through state appropriations to Oregon's regional and smaller campuses will enable them to serve the needs of their students, communities and local economies so critical to the state as a whole. The problems of diminished resources are especially acute for the OUS institutions with smaller enrollment. Less capacity to raise tuition revenue (because of a smaller proportion of nonresident, full fee-paying students) and lower capacity to realize economies of scale place these institutions in a more financially challenging position.

Oregon University System

EDUCATION INNOVATION AND LEADERSHIP: BACKGROUND DOCUMENTS

Wednesday, March 20, 2013

Collaborating for Student Success and Innovation Across the Education Continuum

PK-12

Community Colleges

Oregon University System

Preparing Students for College:
- GEAR UP, Pre-college prep for rural students
- ETIC Pre – Engineering & Computer Science
- Campus Sponsored Pre-College Programs
- College Access Challenge Grants

Collaborating on Standards for Success:
- AP, IB, and Dual Credit opportunities
- Common Core State Standards implementation
- Oregon Diploma alignment
- High School Counselor Outreach and Training

Simplifying Student Transfer for Degree Success:
- Oregon Transfer Module
- Transfer degrees: AA-OT, AS-OT
- Dual Enrollment
- Articulation agreements
- Course Transfer Tools for students

Ensuring Credit for Degrees:
- Reverse Transfer degrees
- Applied Baccalaureate
- WICHE Interstate Passport

Degree Outcomes for State, Student, Workforce:
- Degree Qualifications Profile
- Multi-state assessments
- Collaborative degrees across OUS campuses

Recognizing Student Experience:
- Credit for Prior Learning
- Special programs like Last Mile

OREGON DEPARTMENT OF EDUCATION

COMMUNITY COLLEGES AND WORKFORCE DEVELOPMENT
WORKSOURCE OREGON

Oregon University System

ACCELERATED OPTIONS: ACCELERATING SUCCESS FOR OREGON HIGH SCHOOL STUDENTS

Overview

Accelerated Options enable high school students to participate in college-level coursework and earn college credit. All seven Oregon University System (OUS) institutions offer these opportunities to high school students across the state, and **44% of all newly admitted OUS freshman brought in some form of early college credit in 2011-12**. Accelerated Options **increase rates of college entry, academic success in college, and college retention rates**, and have the potential to keep Oregon's top performing high school graduates in state. As part of ongoing efforts to improve college preparation, and support students moving through the system to graduation, system and policy leaders see Accelerated Options programs as one of the **important and effective strategies necessary to reach the state's 40-40-20 goals for educational attainment and economic prosperity.** The OUS Chancellor's Office works on behalf of students to expand access to Accelerated Options, ensure that credits earned are consistently applied toward degrees from OUS campuses, and research the effectiveness of these programs on college success.

Accelerated Options Lower Tuition Costs, Prepare Students for College

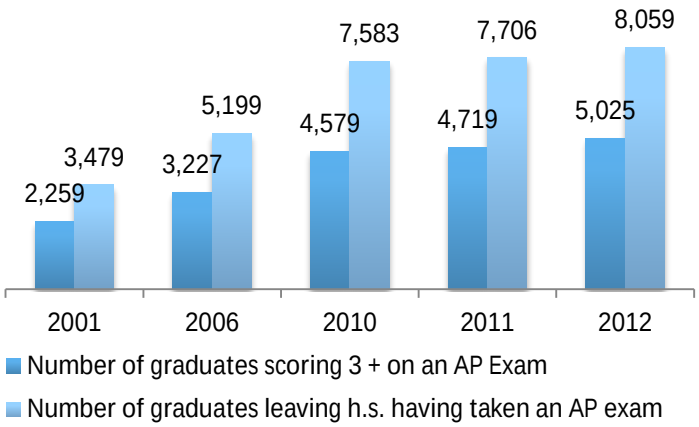
Oregon secondary and postsecondary institutions jointly share responsibility for the success of Accelerated Options provided in high schools. Accelerated Options are part of Oregon's agenda to increase the rigor of the Oregon Diploma and align standards with postsecondary academic requirements. Many options offer some form of tuition assistance and allow students to affordably start taking college credits. A combination of school districts, students, universities, and grants helps provide financial assistance for Accelerated Options for students. As a lower-cost way of getting credits, Accelerated Options programs bring **tuition savings** in college as students can move ahead well into their freshman year, or in some cases, even skip freshman year, saving thousands of dollars in tuition, and potentially on student loans as well.

The Oregon University System has researched the effectiveness of Dual Credit programs on college participation, retention, and student success for Oregonians. A 2010 OUS study showed **that students who participate in Dual Credit programs are more successful in college**. They:

- Have higher college participation rates of 81.4% compared to 72.6% of students who did not participate;
- Continue on to their second year of college at higher rates, 87% for those who took Dual Credit versus 79.9% for those who did not;
- Earn a higher GPA in their freshman year of college of 3.13 versus 2.97 for those who did not participate; and
- Accumulate more college credit by the second year in college of 61.3 credits on average versus 49.8 credits for those who did not participate in Dual Credit.

The study also verified that **Dual Credit instruction prepares students for subsequent college coursework just as effectively as college-situated instruction,** and is a model for such studies nationwide.

Figure A: Growth in AP participation and success, Oregon public high school students



Source: *AP Report to the Nation*, College Board, 2013

A 2013 College Board report shows encouraging news of increases in AP participation in Oregon. Between 2006 and 2012, the number Oregon public high school graduates who took an AP exam, including low-income and minority students, increased by almost 55%. The number of students who achieved grades of 3, 4, and 5 (5 is the top grade) increased by 56% in that same period (see Figure A). Proportionally more graduates who took AP exams are from low-income backgrounds or are students of color: 21% of the students who took the exam in 2012 were low-income, compared with 11% in 2006, and Hispanic/Latino students grew from 4.7% to 10.1% of those who took exams in this 6-year period.

Aligned Course Standards Help Students Earn Credits

OUS and Oregon community colleges have worked to ensure that students receive consistent treatment of their Dual Credit, Advanced Placement (AP), and International Baccalaureate (IB) courses across higher education institutions in the state. These programs have specific, statewide standards that are established by national or international academic organizations that define the programs' instructor qualifications and curriculum. These **standards ensure the rigor of the courses,** which is reinforced for AP and IB courses by the external assessment provided by the exams. For Dual Credit programs, 4 OUS institutions and 17 community colleges agreed to adopt the national standards and program approval process; and for both AP and IB, all OUS institutions and community colleges award students credit for the same number of courses for a given score on an AP or IB exam. In addition to the formal Dual Credit, AP, and IB programs, Accelerated Options programs include the Oregon-specific Expanded Options program.

Programs Delivered Statewide at OUS Campuses

A variety of OUS programs allow high school students to take college coursework, along with college students, via distance learning or on an OUS campus. OUS dual credit programs also offer students college-level courses taught in high schools by qualified college- or university-approved high school teachers. Most of these programs offer concurrent high school and college credits, reduced tuition rates, and support services such as advising. Examples include:

- **Eastern Oregon University**: The Eastern Promise is an innovative regional collaboration between Blue Mountain Community College, EOU, Treasure Valley Community College, the InterMountain Education Service District, and school districts in Eastern Oregon. It is significantly expanding the opportunities for rural students to participate in college-level courses and earn credits or certificates while in high school.
- **Portland State University**: The Challenge Program is a concurrent enrollment program that teaches PSU courses at high school sites in 7 school districts to nearly 1,000 high school seniors, providing them an opportunity to earn college credit. The program emphasizes close interaction between faculty and high school instructors, including training, orientation, site visits, and professional development workshops.
- **Oregon Institute of Technology**: The Oregon High School Transition Program allows high school students to get a head start by taking appropriate 100- and 200-level courses on campus, while the Advance Credit Program partners with local high school instructors to teach Oregon Tech coursework in high school.
- **Oregon State University**: College for High School Students provides opportunities for high school juniors and seniors to take classes on-line with other OSU students through OSU Extended Campus. Students can choose from over 40 college classes in a wide range of subjects.
- **Southern Oregon University**: Advanced Southern Credit Program offers university courses taught in the high schools by high school faculty; and the Early Entry Program, offers concurrent high school and college coursework on the SOU campus.
- **University of Oregon**: The Pre-baccalaureate Program allows talented and motivated high school students from any geographic region to enroll in regular UO classes; and Duck Link allows select high school students living in Lane County to enroll in up to 8 credits per quarter at a reduced fee rate.
- **Eastern Oregon University**: the High School Dual Credit option is offered to schools in the campus region.

PREPARING OREGON'S NEXT GENERATION OF TEACHERS

Oregon's PK-12 teachers are critical to the state's prosperity and success, forming the foundation for learning so that students are work- and college-ready. Educator preparation includes formal university program, licensure by a statewide board, induction of newly licensed educators into their teaching or education-related job, and professional development for the duration of the educator's career. The Oregon University System (OUS) and its Schools and Colleges of Education are continuously examining ways to improve teacher preparation. We share in the responsibility for all segments of the 40-40-20 goal, working together and participating at a statewide policy level in the Oregon Coalition for Quality Teaching and Learning.[1] The Governor's Balanced Budget recognizes the importance of educator preparation and ongoing professional development, as part of a heightened focus on PK-20 student success.

Serving Teachers across the State

Prospective and current **teachers across the state have access to a wide variety of teacher preparation and professional development programs locally in their regions and via distance education.** OUS Schools and Colleges of Education include: EOU College of Education; OSU College of Education; OSU-Cascades Masters of Art in Teaching; PSU Graduate School of Education; SOU School of Education; UO College of Education, and WOU College of Education. OUS collectively awards more Masters Degrees in Education than in any other discipline, with 1,154 students earning Masters degrees, 359 earning Bachelor's degrees, and 58 earning Doctoral Degrees in Education in 2011-12. OUS prepares about half of the educators who received their training in education programs within the state, and serves teachers with professional development and advancement throughout their careers.

Governor Kitzhaber's Plan for Student Achievement Centers

The OUS supports the Governor's Balanced Budget that recognizes the need for ongoing professional development for teachers, with an initiative to establish a "Representative Corps of Professional Educators." The initiative funds establishment of **four to six regional Student Achievement Centers** to promote excellence in teaching and learning for teachers, faculty, early education professionals, administrators, and instructional support personnel. These centers would partner with colleges and universities to improve teacher preparation programs and strengthen clinical placements.

Ensuring P-20 Student Success

The OUS Schools/Colleges of Education continually share best practices and develop initiatives to improve PK-20 student success and outcomes. Some recent strategies include: scholarships and outreach to attract and prepare teachers of color; preparing all teachers to work effectively with diverse students; working to create better clinical experiences for teacher candidates; and preparing teachers in high-demand, high-need areas, such as STEM, bilingual teachers, and special education.

The education deans have recently identified several opportunity areas for **innovative practices in educator preparation focused on student success, and that are consistent with the Governor's goals and proposal:**

- Developing high-quality models for educator internships that prepare candidates to effectively work with diverse students and work in high-demand, high-need areas
- Improving the exchange of data to advance educator preparation, hiring, induction, and evaluation; and
- Increasing the involvement of OUS universities in supporting educators with in-service professional development.

There was a focus on improved teacher induction, mentoring, and teacher preparation in the 2011 Legislative Session, with the passage of House Bill 3474, which appropriated $100,000 to establish an Educator Preparation Improvement Fund, intended to encourage a responsive, collaborative approach to professional development. However, the fund was not ultimately allocated due to budget shortfalls.

[1] The mission of the Oregon Coalition for Quality Teaching and Learning is to improve public school student achievement by promoting policies and initiatives that promote the recruitment, preparation, retention and professional development of Oregon P12 educators.

Recent Initiatives and Innovations Helping Students

Diversifying the Workforce: OUS Schools/Colleges of Education have numerous initiatives to develop a diverse teaching workforce. The Portland Teacher Program and Bilingual Teacher Pathways Programs at PSU, the Lane County Teacher Pathways program at the UO, and Bilingual Teachers Initiative and Bilingual Teaching Fellows Scholarship program at WOU, all recruit and prepare teachers of color and much-needed bilingual teachers. These programs could be expanded with additional funds to provide scholarships to future teachers of color.

Meeting Needs in Shortage Areas: The OUS Schools/Colleges of Education in partnership with school districts and private universities have developed programs to meet critical teaching shortages **in areas including STEM fields, special education, and ESOL**, often times with federal grant funding. SOU and WOU, through a federal grant, provides tuition for practicing teachers to add ESOL endorsements to their licenses; EOU offers its ESOL endorsement program at three regional community colleges; and OSU's College of Education prepares teachers and scholars in STEM and cultural and linguistic diversity. OSU also participates in the Association of Public and Land-grant Universities' Mathematics Teacher Education Partnership, aimed at transforming secondary mathematics teacher preparation.

TEACHOregon: Four OUS Schools/Colleges of Education received grants from the Chalkboard Project's TEACHOregon campaign. Launched in August 2012, this campaign develops and implements innovative models to prepare the next generation of Oregon teachers. The projects will test out ideas such as clustering student teachers in a school together, lengthening the time student teachers spend in schools, and recruiting high-performing students from under-represented minority groups into the profession.

Preparation to Teach Reading: The OUS Schools/Colleges of Education have a variety of efforts to prepare teachers to teach reading. From sponsoring Book Nights at elementary schools to producing internationally-recognized research on children's literacy, OUS is committed to ensuring that every child in Oregon has access to the highest quality reading instruction. For example, READOregon, a collaboration of five OUS institutions, provides online literacy courses and modules for literacy and reading teachers. UO faculty worked with the Oregon Dept. of Education to develop the Oregon Literacy Framework, a research-based guide for literacy work throughout the state. EOU faculty members are leaders in the Mountain Valleys Reading Council, providing outreach to families and professional development to teachers in northeastern Oregon.

National Developments in Educator Preparation

Common Core State Standards: Oregon and most states have adopted the K-12 Common Core State Standards (CCSS) in English/Language Arts and Mathematics that were developed through the National Governors Association and the Council of Chief School Superintendents. These standards describe what K-12 students ought to learn and what skill sets teachers need to be able to teach, so educator programs are incorporating the CCSS into curriculum to train future and current teachers.

STEM Education: The need for improved math and science education is of national concern as it is essential for improving global competitiveness. Enhanced collaborations between educator preparation programs, math and science departments, and businesses/industries are important to filling this need. **The Science and Math Teachers Initiative (SMSI) of the Association of Public and Land Grant Universities is directed at this issue, and PSU, OSU, and the OUS are all participants in this effort**. Nationally, SMTI members prepare more than 8,000 science and mathematics teachers annually, making it the largest STEM new teacher initiative in the country.

Accreditation and Evaluation: Nationally, educator preparation is under close examination. In Oregon, interest in augmenting accreditation and the evaluation of educator preparation programs has been fueled by new teacher evaluation standards by the State Board of Education and new accreditation standards by the Teacher Standards and Practices Commission. Oregon is among the states leading the nation in developing a strong partnership with the newly formed Council of the Accreditation of Education Professionals, which advocates for stronger standards and improved review processes.

REVERSE TRANSFER DEGREE

Background

Today's students move frequently between 2- and 4-year postsecondary institutions in pursuit of education, training and a degree. Some students transfer into 4-year universities before they complete an associate's degree at a community college, with a percentage of this group gaining a bachelor's degree eventually through a combination of credits from both institutions. A new pilot program between Oregon's public community colleges and universities will begin to offer students the option of obtaining a degree through "Reverse Transfer." This recognizes students' achievements with an associate's degree after they have transferred to a 4-year school and have accumulated the credits needed to fulfill the 2-year degree program requirements. It also recognizes the degree completion for the community college, which receives no "credit" for the degree through current data measures tracking completions[1].

The Oregon Department of Community Colleges and Workforce Development was awarded **a $450,000 grant from the Lumina Foundation to launch this innovative program with the Oregon University System**. The Lumina grant for Oregon will fund pilots in ten community colleges and all seven Oregon University System campuses, with all seventeen community colleges in the state joining by the end of the grant period.

Benefits of the "Reverse Transfer" Degree

Students who are awarded an associate's degree through Reverse Transfer benefit in a number of ways:

- They are more likely to stay in school and finish a 4-year degree program. Some students can get discouraged after they transfer to a 4-year college/university and see more years ahead of them, still, before they get a degree. If they are awarded their associate's degree while completing their bachelor's degree, the accomplishment of this helps them stay motivated and on track to a 4-year degree. Statistics from recent work in this area show retention rates improve by 10% for those students who receive an associate's degree through Reverse Transfer once they are at a 4-year institution[2].
- Graduates will have both an associate's and a bachelor's degree on their resume, reflecting a broader, more accurate view of their skills and training received over time. For those who do not complete a bachelor's degree after transferring but receive an associate's degree with accrued credits, they have at least the one degree to help them in their career goals and for job prospects; and if they return to complete their bachelor's degree later it will be easier to re-enter and move more quickly towards completion.
- If the associate's degree is in a more technical, applied area than the bachelor's degree, this can be attractive to a potential employer who is looking for someone who understands both the hands-on and the theoretical aspects of a given field.

Colleges and universities also benefit from Reverse Transfer:

- Community college completions will more accurately reflect the investment of time, resources and support that 2-year institutions have in the students who transfer prior to degree completion. These institutions will gain credit for the degrees in their completion outcomes, create closer

[1] Data on graduation rates nationally is collected by the National Center for Education Statistics for the Integrated Postsecondary Education Data System, which counts only first-time, full-time students who finish a degree at the institution at which they began over a period of 3 years at 2-year institutions and 6 years at 4-year institutions. It is now recognized that this approach does not accurately reflect the behavior of today's students who tend to move back and forth between community colleges and 4-year institutions.

[2] University of Texas, El Paso and El Paso Community College collaboration on reverse transfer

transfer collaborations with 4-year institutions, and gain alumni who feel a greater connection to the community college.

- Community colleges that lose students today before degree completion have to count this as a "failure" even if students' academic experience at that school leads them to a bachelor's degree at a 4-year institution. Reverse Transfer will record the associate's degree earned after transfer as a success and credit the community college with this when calculating their completions.
- The counting of completed associate's degrees will more accurately reflect the graduation rates and achievements of community colleges; and will be represented in the state's important 40-40-20 goal to increase educational attainment in Oregon.

Next Steps in Oregon

After studying a successful model of Reverse Transfer in El Paso, Texas, and with the support of the Lumina Grant, Oregon's public community colleges and universities are undertaking a pilot program with these partner institutions:

- Oregon State University and Linn-Benton Community College;
- Eastern Oregon University, Blue Mountain Community College, and Treasure Valley Community College;
- Oregon Institute of Technology and Klamath Community College;
- Portland State University, Portland Community College, and Tillamook Bay Community College
- Southern Oregon University and Rogue Community College;
- University of Oregon and Lane Community College; and
- Wetern Oregon University and Chemeketa Community College.
- Pilot partners are determining the administrative systems and technology they need in place to begin tracking and extracting student credit data from transcripts between the two or more institutions who are partnering. This is complex given the need to share information between two institutions in two different postsecondary sectors and will take some resources and a high level of commitment to accomplish.
- Outreach to students and the public at 2- and 4-year institutions about degree attainment through Reverse Transfer is an important part of successfully implementing this in Oregon and seeing fully the positive outcomes of the program for students and for the campuses. Partnering institutions are working together to find the best methods and channels to use to communicate the opportunity of Reverse Transfer to their students. With the support of the Lumina grant, student-friendly materials have been created for use at participating institutions to make students aware of the opportunity to achieve the Reverse Transfer Degree, and a central website for students has been created at www.ous.edu/reversetransfer.

For More Information

For more information on associate's degree attainment through Reverse Transfer and the pilots in Oregon, please contact:

Joe Holliday, Assistant Vice Chancellor for Student Success Initiatives, Oregon University System, at 503-725-5768 or Joe_Holliday@ous.edu

Elizabeth Cox Brand, Communications and Research Director, The Oregon Department of Community Colleges and Workforce Development, at 503-947-2454 or Elizabeth.Coxbrand@state.or.us

Oregon University System

OUS OPERATING BUDGET: DRIVING OUTCOMES: BACKGROUND DOCUMENTS

Thursday, March 21, 2013

STUDENT & UNIVERSITY SUPPORT FUNDS: HELPING STUDENTS SUCCEED TO DEGREE

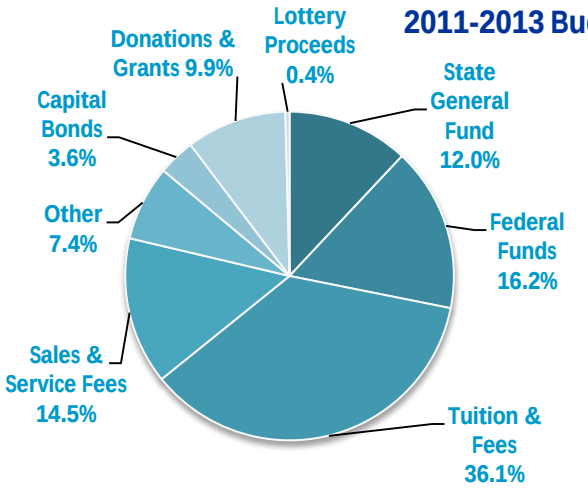
OUS Supports Students with Diverse Resources

The Oregon University System and its public universities support our students through high quality academic programs, a diverse array of support services that help students succeed and earn degrees, and engagement in research and other experiential activities that prepare them for the workforce. Supporting students with these diverse programs requires a variety of resources. In recent years, due to the recession and significant increases in enrollment, State General Fund support for students has declined to 12% of total OUS funding sources. This has placed more pressure on other sources of revenue, primarily student tuition, to make up for lower General Fund appropriations. Currently **student tuition and fees are the largest revenue source to support students**, making up about 36% of OUS fund sources (see pie chart).

Top Priority: Serving Student Instruction Needs

Because of the **need to spread university resources over many months to several years**, campuses must ensure that they have adequate resources available to pay for both **known commitments that serve students**–such as paying faculty and staff, maintaining and repairing classrooms, funding long-term facility commitments–**and unknown future expenses**, such as emergency repairs, major system breakdowns, or additional part-time faculty and staff to serve unexpected enrollment increases. Student instruction and support costs are funded from tuition and other revenues, called fund balances ("Fund(s)") in common accounting terms.

OUS Source of Funds 2011-2013 Budget



Tuition and fee revenues are collected by campuses at the beginning of each term, and **are spread over one or more academic years to pay for all areas related to student instruction and success**, including student retention and academic support programs. These Funds, as well as other revenues, are collectively used to pay current faculty and staff, fund academic programs overall, repair and maintain classrooms, and bring in additional faculty to provide instruction to more than 100,000 students across the state. Oregon's universities are fiscally cautious and typically hire part-time faculty and temporary staff to meet enrollment demand in the short-run. When enrollment is sustained for multiple terms, permanent faculty and staff are recruited to serve the increased number of students. When faculty are hired, institutions must provide resources to meet laboratory, technology, and other equipment needs for them to be efficient and effective in preparing students for careers and jobs in today's workforce.

Being Accountable: Mitigating State and University Risks

Universities are required to maintain adequate levels of Funds to support student instruction and direct services, to mitigate current and future risks (e.g., revenue shortfalls and unanticipated or emergency expenditures), and to ensure stable tuition rates. Fund balance levels are related to all of this, and are a crucial consideration in long-term financial planning. Credit rating agencies monitor Fund levels to evaluate a university's continued creditworthiness. The adequacy of Funds is assessed based upon a university's own specific circumstances. The Government Finance Officers Association

recommends, at a minimum, that universities, regardless of size, **maintain total Funds of no less than two months of regular operating revenues**. A university's particular situation often may require levels of total Funds significantly in excess of this recommended minimum level (see example below).

Stewardship Role: Ensuring Appropriate Student Support and Fund Levels

In establishing a policy governing the level of Funds to support students and university operations and risks, the following factors are considered:

- The **predictability of a university's revenues** and the volatility of its expenditures, e.g., higher levels of Funds may be needed if significant revenue sources are subject to unpredictable fluctuations or if operating expenditures are highly volatile;
- A university's perceived exposure to significant one-time outlays, e.g., **disasters like fires or floods**, immediate capital needs, state budget cuts;
- **Liquidity issues**, such as an imbalance between when revenues actually become available and the need to cover existing liabilities immediately, which may require that a higher level of Funds be maintained to cover these;
- Commitments and assignments, e.g., universities may wish to maintain higher levels of Funds to compensate for any portion of unrestricted fund balance already committed or **dedicated by the university for a specific purpose** (such as the WOU example, see side box); and
- The potential **drain upon Education and General Fund resources from Other Funds*** as well as the availability of resources in Other Funds*, e.g., deficits in Other Funds* may require that a higher level of Funds be maintained.

Campus Use of Student Support Funding: WOU Example

Western Oregon University

WOU's unique guaranteed tuition Promise Program has helped Oregon students and families plan for tuition payments by offering a locked-in tuition rate for the four years a student is in college. In order for this program to remain viable, WOU must keep a certain amount of funds held in reserve in their fund balance, as tuition for these students cannot be increased in response to the changing financial conditions of the State or rising costs.

Helping students succeed throughout their time at an Oregon University System campus and earn a degree is everyone's collective goal. **Through prudent use of Funds for student support and university on-going operations, OUS can ensure that expected and unexpected expenditures do not inhibit the ability of the campus to first and always serve our students** and meet Oregon's important student, workforce, and economic outcomes.

*Examples of Other Funds include service departments such as telecom operations, designated operating funds such as conferences, and auxiliary operations.

SPORTS LOTTERY: IMPROVING ACCESS AND EQUITY FOR OREGON STUDENTS

Budget Overview

Sports Lottery funding (previously called Sports Action Lottery) was zero funded in the Governor's Balanced Budget for the 2013-2015 biennium. In 2011-2013, Sport Lottery was funded at $8.6 million. This program, established in 1989, has been used to fund intercollegiate athletics and to fund graduate student academic scholarships, as well. It has had a positive impact on enrollment at the OUS campuses, particularly those with smaller athletic programs, and thus contributes to the 40-40-20 statewide goal.

History of Sports Lottery Funding

In 1989, the Oregon Legislature passed HB 3262, which gave the Oregon Lottery statutory authority to establish a sports betting program. The Sports Action Lottery game was a way to raise money for intercollegiate athletics at the seven OUS institutions. During the 2005 Legislative session, HB 3466 was passed, removing the statutory authority for the Lottery to run sports betting games. The bill replaced the revenue to the OUS with a guaranteed 1% of the lottery money transferred to the Economic Development Fund. OUS received the guaranteed 1% for only one biennium. For subsequent biennia the funding level was legislatively reduced. From its inception through 2006, the program was referred to as Sports Action Lottery; after the passage of HB 3466, the program became simply Sports Lottery.

Positive Impacts on Students

Across Oregon, students have been able to enroll in a public university due to Sports Lottery funding when they might otherwise not have had access to college. Being engaged in intercollegiate athletics, while pursuing an academic degree, generally has a positive multiplier effect on students. Data show that the average student-athlete has better retention rates, GPAs, and graduation rates than students do overall. Sports Lottery funding is also a primary way that campuses are able to meet Title IX requirements to equitably fund women's athletics programs. De-funding of Sports Lottery will have a quick and direct impact on female and male athletics in Oregon, as well as on the overall operations of intercollegiate sports, especially at those campuses that do not receive Pac-12 related broadcast and other related revenues.

Funding for Athletics and Scholarships

Sports Lottery is divided into funding for intercollegiate athletics (88%) and graduate student academic scholarships (12%).

Sports Lottery funding, especially at the smaller campuses and PSU, has immense economic impact on the communities in which the campuses reside. The intercollegiate athletics programs not only provide jobs but also provide an avenue into higher education for students who might not otherwise think it feasible to attend a university.

Annual Allocation for Sports Lottery

July 1, 2007 - Present	EOU	OIT	OSU	PSU	SOU	UO	WOU	TOTAL
First $1.8 million	5.00%	5.00%	30.14%	18.71%	5.00%	31.15%	5.00%	100.00%
Next $500,000	15.00%	15.00%	5.00%	20.00%	15.00%	5.00%	25.00%	100.00%
After initial $2.3 million	8.00%	8.00%	23.00%	19.00%	8.00%	24.00%	10.00%	100.00%

Investment in student athletes also supports the overall goal of student diversity at every level: gender, geographic, ethnic, and economic background. Some institutions choose to use some of their Sports Lottery funding for student athlete scholarships, providing access and helping student athletes in their pursuit of a degree while supporting the state's 40-40-20 education attainment goal.

A 12% dedicated portion of the Sports Lottery proceeds has been invested in graduate scholarship support for students in programs across all institutions and programs, annually providing more than $500,000. These funds are used for both merit based and need based aid, and directly help graduate students who are ineligible for the Oregon Opportunity Grant, the Pell Grant, and other programs generally reserved for undergraduate students.

Sports Lottery: Sample Campus Impacts

Oregon Institute of Technology

Sports Lottery funding enables Oregon Tech to provide access to nearly 300 student athletes, and has economic impacts in funding travel/transportation of its sports teams. Many of the rooms booked and meals eaten during sports travel to and from events occur within Oregon. The regional universities often provide more direct support in the rural areas of Oregon as they stop in small towns such as Burns, Lakeview and Oakridge, for example. Oregon Tech added Men's Soccer when lottery funds increased in 2007, resulting in more students for Oregon Tech as well as increased economic returns for the community. An additional benefit of adding this sport is that it improved diversity in every regard in the student body. Student athletes often choose Oregon Tech due to the combination of strong academic and athletic programs.

Number of Student Athletes 2011-12 Academic Year Benefiting from Sports Lottery

Institution	Student Athletes
EOU	273
OIT	300
OSU	500
PSU	225
SOU	329
UO	500
WOU	420
TOTAL	**2,547**

Portland State University

PSU utilizes its Sports Lottery distribution to fund student athlete scholarships for its Division I sports programs. The lottery funding increases opportunities for students who otherwise would not be funded by other means, and helps PSU increase retention and graduation rates of its student athletes. That retention allows for the growth and experience of the student athlete that shows in both on- and off-field success. The PSU academic performance rate of student athletes has steadily increased over the past three years.

Oregon State University

In combination with other departmental or college-based resources, the Sports Lottery funding has been an important source for providing graduate student competitive financial aid to bring in students of color to OSU for graduate study. Graduate and post-baccalaureate professional degree-seeking students in good standing are eligible for scholarship consideration. Half of the available funds are awarded on the basis of academic merit alone, with the remaining half awarded on the basis of financial need and merit. In addition to acknowledging academic excellence, departments are encouraged to nominate underrepresented students of color and women admitted to programs in which such underrepresentation exists.

Oregon University System

ACCOUNTABILITY FOR STUDENT SUCCESS: BACKGROUND DOCUMENTS

Thursday, March 21, 2013

OUS PERFORMANCE MEASUREMENT: A HISTORY OF CHANGE

In 1997, the Oregon University System began developing a performance measurement system in response to Senate Bill 919. In the years following, OUS engaged Chancellor's Office staff, campus leaders, and members of the public to identify performance indicators for the System; in October 1997, the Board approved an array of 30 measures. Through subsequent reviews, performance reporting was further refined and streamlined to focus on high-level outcomes. Currently, the Board receives annual performance reports on 13 indicators.

The Oregon University System also participates in a formal reporting process for a set of legislatively-approved performance measures. This state-level effort began in 1989 with the publication of *Oregon Shines,* which articulates the state's strategic vision. The Oregon University System tracks 23 different indicators, reported annually to the Department of Administrative Services (DAS) and biennially to the Oregon Legislature.

In 2010, the State Board of Higher Education and its member institutions developed a proposal to restructure the relationship between the Oregon University System and State of Oregon. Three bills were passed in the June 2011 Legislative session that impact governance, accountability, and performance measurement. The first, Senate Bill 242, created the Higher Education Coordinating Commission that coordinates postsecondary policy between the Oregon University System and community colleges as well as changed the status of the OUS with the State of Oregon to that of a public university system. The second, SB 909, established the Oregon Education Investment Board (OEIB) to oversee a unified public education system. And the third, SB 253, set Oregon's statewide goal for educational attainment over the next 10-15 years. This goal, known as the 40-40-20 goal, states that 40% of students will earn a 4-year degree or more; 40% will earn an Associate's degree or post-high school certificate; and the remaining 20% will earn a high school diploma or equivalent.

In order to assure the attainment of Oregon's 40-40-20 goals for higher education and, as a result of being granted greater autonomy, in April of 2012 the University System adopted a set of outcome measures in an Achievement Compact reported annually to the OEIB. This Achievement Compact is comprised of eight outcome measures in the areas of completion, quality, and connections with other education sectors. Each measure is reported for all Oregonian students, for underrepresented minority Oregonians, and for economically disadvantaged Oregonians.

For the present, it is necessary to report on these three different—and sometimes overlapping—sets of performance measures. The following pages include excerpts from all three sets of measures: the OEIB Achievement Compacts; the DAS Legislatively-approved KPMs (Key Performance Measures); and the OUS Board Performance Report. It is important to note that what is reported in the fact book are data compiled at a System-level. The Achievement Compact and OUS Board measures both contain campus-level data and, in the case of the OUS Board reports, mission-driven or campus-specific metrics are also included.

For more information, or to download these reports in their entirety, please visit http://www.ous.edu/factreport/mp.

OUS shares in the responsibility for all segments of 40-40-20. Not only will OUS place a primary focus on bachelor's and advanced degrees, but will also develop joint strategies to assist the community colleges in achieving their goal of 40; as well as placing a focus on educator preparation, engagement with K-12, and enhancing the K-12 pipeline.

Outcome Measures	***2010-11***			***2011-12 Projected***			***2012-13 Targets***		
	All Oregonians	**Disadvantaged Students***		**All Oregonians**	**Disadvantaged Students***		**All Oregonians**	**Disadvantaged Students***	
		Minority	Pell Eligible		Minority	Pell Eligible		Minority	Pell Eligible
Completion									
# of bachelor's degrees awarded to Oregonians	11,132	1,063	5,511	11,917	1,138	5,900	12,529	1,196	6,203
# of bachelor's degrees awarded to rural Oregonians	1,487	147	883	1,548	153	919	1,639	162	973
# of advanced degrees awarded to Oregonians	2,976	239	n/a	2,803	225	n/a	2,788	224	n/a
Quality									
% of graduates unemployed in Oregon compared with the % of workforce unemployed in Oregon	Future Submission	n/a	n/a	Future Submission	n/a	n/a	Future Submission	n/a	n/a
Employer satisfaction	Future Submission	n/a	n/a	Future Submission	n/a	n/a	Future Submission	n/a	n/a
Alumni satisfaction	Future Submission	n/a	n/a	Future Submission	n/a	n/a	Future Submission	n/a	n/a
Connections									
# and % of newly admitted Oregon freshmen entering with HS dual credit or other early college credit	3,308	476	1,194	3,321	529	1,189	3,332	532	1,200
	42%	36%	39%	44%	38%	40%	44%	38%	41%
# of bachelor's degrees awarded to transfer students from Oregon community colleges	3,269	384	2,106	3,573	420	2,302	3,748	440	2,414

* A student is defined as being disadvantaged per OEIB 705-0010-0040 by being either a member of an under-represented racial or ethnic group and/or eligible to receive a Pell Grant. The Federal Pell Grant is a need-based grant from the federal government intended for undergraduate students who have not earned a bachelor's degree; eligibility is subject to change by criteria set forth by the federal government. For this report, only Pell recipients are counted. Students self-identify both race and ethnicity. Inclusion in the multi-racial category is determined by identification with more than one race and inclusion of one or more of the underrepresented groups. A student may be a member of both an underrepresented minority group and be Pell eligible.

** To protect confidentiality of individual students, data is not reported for cells containing fewer than 6 students or when small cell sizes can be deduced from either OUS or institutional totals.

OUS Performance Measures

Access and Participation

	State KPM†	Board PM‡	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
First-Time Freshman Headcount[1]	●		10,119	10,748	11,575	11,512	11,778	11,507
Community College Transfer Headcount[2]	●		3,414	3,491	3,525	4,160	4,657	5,125
Total Credit Enrollment Headcount[3]		●	81,002	82,249	86,546	91,580	96,960	100,316
New Undergraduate Enrollment Headcount[4]		●	16,841	17,523	18,956	19,721	20,448	20,633
Freshman Participation Rate[5]	●		20.5%	20.7%	20.5%	20.2%	20.0%	20.0%

[1] Headcount of entering first-time freshmen at an OUS institution as of the 4th week of the fall term.

[2] Headcount of all students enrolled at an OUS institution who were new transfers from an Oregon community college as of the 4th week of the fall term.

[3] Headcount of all students enrolled in an OUS institution as of the 4th week of the fall term, regardless of course load.

[4] Headcount enrollment of newly admitted freshmen and undergraduate transfers (from all 2-year and 4-year postsecondary institutions) at an OUS institution during the fall term.

[5] Ratio of OUS first-time freshmen from an Oregon high school to Oregon high school graduates from the previous school year.

† Key Performance Measures currently reported to the State of Oregon through DAS
‡ Performance measures currently reported to the OUS State Board of Higher Education
Full performance reports are available on the OUS website at www.ous.edu/factreprot/mp/

Educated Citizenry

	State KPM†	Board PM‡	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
Bachelor's Degrees[1]	●	●	12,668	12,651	12,575	13,315	13,926	15,492
Advanced Degrees[2]	●	●	4,448	4,246	4,369	4,605	4,768	4,717
Total Degrees[3]		●	17,116	16,897	16,944	17,920	18,694	20,209

[1] Total number of bachelor's degrees awarded by OUS institutions annually.

[2] Total number of master's, doctoral, and first professional degrees awarded annually.

[3] Total number of bachelor's, master's, doctoral, and first professional degrees awarded annually.

Workforce Enhancement

	State KPM†	Board PM‡	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
Engineering and Computer Science Degrees[1]	●	[2]	1,433	1,264	1,400	1,458	1,641	1,750

[1] Total number of degrees granted in engineering, engineering-related technologies, and computer science.

[2] Each institution reports degrees in designated shortage areas in the Board performance reports. The degree shortage areas may be teaching endorsements in science or mathematics, engineering, or other K-12 endorsements as well as degrees in computer science, engineering, and engineering technologies, depending on the institution's mission.

Access and Affordability

	State KPM†	Board PM‡	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
Net Cost as a Percentage of Income[1]	●		24.8%	24.3%	24.5%	25.7%	28.6%	N/A

[1] Average cost of attendance minus grant aid as a percentage of Oregon median family income for resident undergraduates with a valid FAFSA.

† Key Performance Measures currently reported to the State of Oregon through DAS
‡ Performance measures currently reported to the OUS State Board of Higher Education
Full performance reports are available on the OUS website at www.ous.edu/factreprot/mp/

Graduate Success

	State KPM†	Board PM‡	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
Bachelor's Graduates Employed, Continuing Education, or Engaged in Other Activity of Choice[1]		●	96.6%	-	N/A	-	N/A	-
Bachelor's Graduates Employed and/or Continuing Education[2]	●		92.0%	-	N/A	-	N/A	-
Percentage of Graduates Employed in Oregon[3]	●		76.0%	-	N/A	-	N/A	-
Percentage of Bachelor's Graduates Completing an Internship[4]	●	●	89.6%	-	N/A	-	N/A	-
Graduate Satisfaction[5]	●		4.2	-	N/A	-	N/A	-
Graduate Satisfaction[6]		●	86.1%	-	N/A	-	N/A	-
Ratio of Students to Full-Time Faculty[7]	●	●	25.3	25.1	25.6	26.9	27.2	26.8

[1] Percentage of bachelor's degree recipients, surveyed six to twelve months following graduation, who report that they are employed, continuing their studies, volunteering, or working at home.

[2] Percentage of bachelor's degree recipients, surveyed six to twelve months following graduation, who report that they are employed or continuing their studies.

[3] Percentage of employed bachelor's degree recipients, surveyed six to twelve months following graduation, who report that they are employed in the state of Oregon.

[4] Percentage of bachelor's degree recipients completing an OUS-approved internship.

[5] Average rating of overall quality of experience by recent OUS bachelor's graduates on a 5-point scale.

[6] Percentage of OUS bachelor's degree recipients rating the quality of their overall experience as "very good" or "excellent" on a 5-point scale.

[7] The ratio of fall FTE enrollment to full-time instructional faculty headcount.

NOTE: With the exception of "ratio of students to full-time faculty," data for the measures in this section are obtained through a biennial survey of recent bachelor's recipients. Staff and budget reductions in the Chancellor's Office forced the suspension of survey activities in 2008-09.

† Key Performance Measures currently reported to the State of Oregon through DAS
‡ Performance measures currently reported to the OUS State Board of Higher Education
Full performance reports are available on the OUS website at www.ous.edu/factreprot/mp/

Efficient Fiscal Stewardship

	State KPM†	Board PM‡	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
Total Gifts from Philanthropic Sources ($ in millions)[1]	●		$114.3	$137.4	$150.8	$209.7	$143.4	$128.0
External Funds Generated per State Dollar Invested in SWPS ($)[2]	●		$1.4	$1.3	$1.6	$1.5	$2.2	$2.1
Net Foundation Assets ($ in millions)[3]		●	$1,231.0	$1,384.5	$1,153.5	$1,206.5	$1,378.7	$1,396.1

[1] Total annual gifts from philanthropic sources.

[2] External funds generated per state dollar invested in Statewide Public Services (SWPS): Oregon State University's Extension Service, Agricultural Experiment Station, and Forest Research Laboratory.

[3] Net assets of each foundation as reported in the audited financial statements of each institution.

Knowledge Creation and Innovation Advancement

	State KPM†	Board PM‡	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
Total Sponsored Grant and Contract Expenditures ($ in millions)[1]	●	●	$307.3	$316.0	$350.9	$380.2	$409.5	$418.4
Sponsored Grant and Contract Expenditures per Faculty ($ in thousands)[2]	●		$139.6	$142.1	$153.7	$165.9	$170.5	$168.0

[1] Total of externally funded expenses related to sponsored research, sponsored instruction, and other sponsored activities. The definition used for reporting sponsored research changed slightly following recent refinements made by the OUS Research Council and the Chancellor's Office. Consequently, there are minor differences in the numbers reported here compared to those reported previously. The new data definition has been applied to all numbers reported in this fact book.

[2] Sponsored research dollars per faculty at research/doctoral universities OSU, PSU, and UO.

† Key Performance Measures currently reported to the State of Oregon through DAS
‡ Performance measures currently reported to the OUS State Board of Higher Education
Full performance reports are available on the OUS website at www.ous.edu/factreprot/mp/

Student Progress and Completion

	State KPM†	Board PM‡	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
Retention Rate (First-Time Freshmen)[1]	●	●	79.5%	80.5%	79.8%	81.7%	82.4%	82.0%
Retention Rate (at original university)[2]		●	76.2%	77.7%	76.7%	78.6%	79.5%	79.4%
Six-Year Completion Rate (First-Time Freshmen)[3]	●	●	59.0%	59.7%	59.4%	58.9%	60.0%	59.8%
Six-Year Completion Rate (at original university)[4]		●	53.5%	54.2%	53.8%	53.3%	54.2%	54.0%
Average Years to Degree (First-Time Freshmen)[5]	●		4.61	4.60	4.57	4.56	4.55	4.58
Four-Year Completion Rate (Transfers)[6]	●		71.0%	68.9%	72.5%	69.4%	71.9%	71.9%
Average Years to Degree (Transfers)[7]	●		2.58	2.60	2.65	2.61	2.65	2.69

[1] Percentage of first-time, full-time freshmen who returned to any OUS institution for the second fall.

[2] Percentage of first-time, full-time freshmen who returned to their initial OUS institution for the second fall.

[3] Percentage of first-time, full-time freshmen entering and graduating from any OUS institution within six years.

[4] Percentage of first-time, full-time freshmen graduating from their initial OUS institution within six years.

[5] Average time to complete a bachelor's degree, in years, for students entering as full-time freshmen.

[6] Percentage of transfer students entering with 90-134 credits who complete a bachelor's degree at an OUS university (4-yr graduation rate).

[7] Average time to complete a bachelor's degree, in years, for transfer students entering with 90-134 credits.
NOTE: To comply with the required timetable for federal reporting, degrees data used to report completion rates and time to degree are compiled later in the academic year. Consequently, data on 2011-12 completion rates and time to degree will not be available until spring term 2013.

† Key Performance Measures currently reported to the State of Oregon through DAS
‡ Performance measures currently reported to the OUS State Board of Higher Education
Full performance reports are available on the OUS website at www.ous.edu/factreprot/mp/

State-Mandated Measures

	State KPM†	Board PM‡	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
Customer Service Survey Results[1]	●		-	86.6%	-	N/A	-	N/A
Board Best Practices[2]	●		-	93.3%	-	100.0%	-	N/A

[1] Percentage of customers rating their satisfaction with the agency's overall customer service as "good" or "excellent"; reported biennially. Staff and budget reductions in the Chancellor's Office forced the suspension of survey activities in 2008-09.

[2] Percentage of best practices met by the State Board of Higher Education. The Board will be re-surveyed during the 2012-13 academic year.

† Key Performance Measures currently reported to the State of Oregon through DAS
‡ Performance measures currently reported to the OUS State Board of Higher Education
Full performance reports are available on the OUS website at www.ous.edu/factreprot/mp/

Oregon University System

STUDENT ACCESS AND AFFORDABILITY: BACKGROUND DOCUMENTS

Thursday, March 21, 2013

Oregon University System

2013 Legislative Issue Brief Higher Education

STUDENT AFFORDABILITY: BALANCING TUITION, FUNDING, AND FINANCIAL AID

Factors Impacting Tuition and Students

The Oregon University System is committed to keeping a quality university education accessible and affordable for all Oregonians. Both the level of tuition and the size of annual increases are important factors that determine whether a public university education is affordable. Tuition levels can affect college-going aspirations, in-college decisions, and success to graduation for many Oregonians, especially those from low- to moderate-income backgrounds. This Brief summarizes several **key interrelated factors that are critical to college affordability: tuition levels, state funding, financial aid, and campus and student affordability strategies**. Through a combination of efforts—institutional aid programs, private support, and other campus strategies—Oregon's public universities balance tuition levels with financial assistance to keep college affordable for Oregon's families and students.

Critical Affordability Issues in this Brief:

- As a result of SB 242, **students now are more involved in tuition-setting.**
- With reduced state support, Oregon students pay 72% of the cost of education. The student share doubled in the last two decades from 36% in 1991-92.
- Stable and adequate state funding is especially critical to keep tuition affordable in Oregon which has lower than average per capita income. **Oregon ranks 44th nationally for state appropriations per student.**
- Oregon Opportunity Grants and campus fee remissions (tuition discounts) provide affordable access for low- and moderate-income students.
- Student borrowing extends access but raises concerns about effect on retention, degree and career choices.
- Planning and taking college-credit courses in high school can lower students' tuition costs and borrowing.

Tuition-Setting Process: The State Board of Higher Education annually sets OUS tuition and fees, based on recommendations from the campuses and the Chancellor's Office. With the passage of the 2011 historic higher education reform in Senate Bill 242, **students are now more broadly involved on university-based committees that develop tuition rate proposals** sent to the Board for review and approval each year.

Recent Tuition Increases Linked to State Investment

The average tuition and fees for an undergraduate resident OUS student is currently $7,877 after an average increase of 3.4% for 2012-13 (see chart to the right for campus tuition rates). According to the last available national comparisons in 2011-12, OUS campuses have generally fallen near or below the average tuition of their peers.[1] In the first year of the 2011-2013 biennium, OUS tuition increased an average of 7.2%, following a 16% decrease in 2011-2013 state appropriations. As state funding has either stagnated or decreased in past years, students and families have replaced some of the loss in state funding through higher tuition costs. **Since 1992, even after controlling for inflation, tuition and fees at OUS universities have approximately doubled as costs shifted from investments by the state to more costs for students and families.**

Undergraduate Tuition & Fees, 2012-13
Annual Cost for 15 Credit Hours

Institution	Resident	Nonresident
Eastern Oregon University	$7,238	$15,720*
Oregon Inst. of Technology	$8,308	$23,671
Oregon State University	$8,138	$22,322
OSU-Cascades	$6,855	$21,399
Portland State University	$7,653	$22,863
Southern Oregon University	$7,521	$20,238
University of Oregon	$9,310	$28,660
Western Oregon University**	$7,989	$21,114

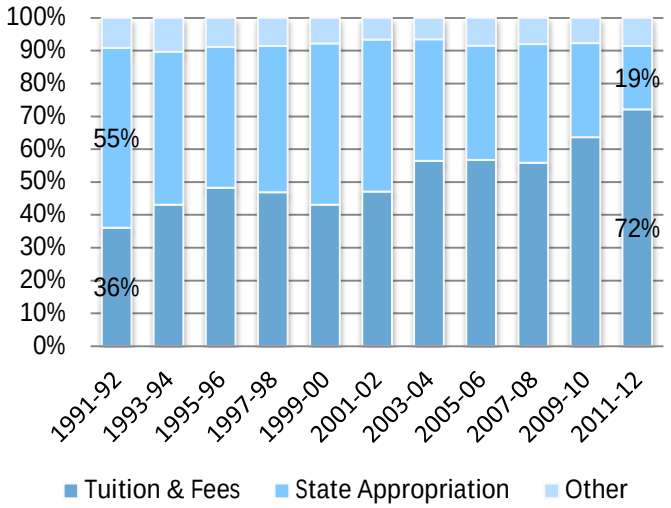
*Non-resident students from Idaho & Washington pay resident EOU tuition.
**WOU also offers an optional Promise rate that is initially a higher rate but is guaranteed for four years

[1] Source: Integrated Postsecondary Education Data System.

Student/State Share of College Costs

Campuses have responded to the increased tuition rates for students with cost-saving and efficiency measures, increasing donor-funded campus aid, leveraging state and federal aid, and numerous other strategies. The passage of **SB 242 also allowed the System increased financial agility, enabling campuses to invest more in students with savings achieved through new efficiencies**. Stable state funding will enable the universities to keep tuition increases moderate over time, especially important in Oregon, which has relatively low average per-capita income levels.[2] The level of Oregon's appropriations for higher education is the primary driver in the System's ability to keep tuition increases stable and low, to offer high-quality programs, and to continue to meet the enrollment demand, the 40-40-20 goal, and fully support the success of Oregon students all the way to degree.

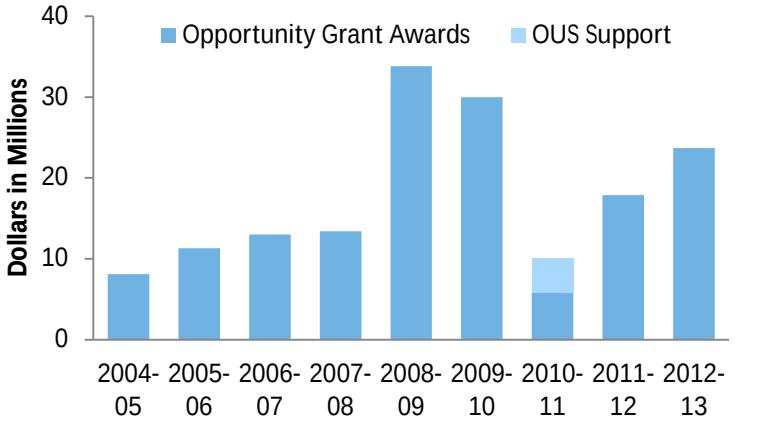
Student Share of Higher Education Costs is Increasing



Need-Based Grant Aid: Sharing Responsibility for Student Attainment

Government investment in need-based grant aid is an important factor in keeping college affordable for low to moderate-income students and families. The two primary public need-based grant programs are the Federal Pell Grant, which was awarded to 28,882 OUS students, and the Oregon Opportunity Grant, which was awarded to 13,182 OUS students in the current academic year, 2012-13.

Oregon Opportunity Grant Dollars Awarded to OUS students



Oregon has had significantly low state funded need-based financial aid compared to neighboring states and the national average. For 2010-11, the estimated need-based aid per undergraduate student in Oregon was $114, compared to $829 per student in Washington, $736 per student in California, and $447 as the per-student national average.[3] The Oregon Opportunity Grant was structured in 2004-05 to a Shared Responsibility Model based on an underlying framework that all partners—the state, the federal government, the family, and the student—would share responsibility in ensuring affordable access. In recent years, due to the state funding challenges, the state investment has not kept pace with the number of eligible students and financial need. **The OOG grant dollars awarded to OUS students fell from a high of $33.8 million in 2008-09 to $5.8 million in 2010-11, then increased to $23.7 million in 2012-13.**

The OUS supports the Governor's and Treasurer's recommendations for increased investment in state funded need-based financial aid to help close Oregon's significant gap in this area, in concert with stabilized

[2] In 2011, Oregon's per capita personal income ranked 34th nationally, while neighboring Washington ranked 15th. Source: *Per Capita Personal Income: Oregon and Washington Comparisons*, by Nick Beleiciks, Gail Krumenauer, WorkSource Oregon, November 19, 2012.

[3] Source: *42nd Annual Survey Report on State-Sponsored Student Financial Aid*, National Association of State Student Grant and Aid Programs (NASGAP), Table 12, Estimated Undergraduate Grant Dollars per Undergraduate Enrollment, by State, 2010-11 academic year.

funding. Governor Kitzhaber's budget recommendation to increase total 2013-2015 funding for the OOG program by 20% to $119.3 million would improve college access for thousands of eligible students whom the program currently has to turn away because of insufficient funds.

Funding levels and structural decisions made at the federal level for the Pell Grant greatly impact affordability and access for low- to moderate-income students and families in Oregon. Student support through the Pell Grant, campus aid, and other forms of aid have helped somewhat to offset OOG shortfalls in recent years. While the **total Pell Grant amounts to OUS students decreased in the most recent academic year by $5 million, the previous several years showed significant increases,** from $50 million in 2007-08, to $124 million in 2012-13. However, maximum years of eligibility for Pell Grants was reduced to six academic years in 2012, a change that will **negatively impact students transferring from community colleges into OUS** and returning adult students who are at or near that maximum already.

University Aid Increases Affordability

With the OOG underfunded, OUS universities have increased campus financial aid to the extent possible through private donor funds, fee remissions (tuition discounts), and other affordability strategies to help fill this gap**. Campus aid increased significantly over the last few biennia, with fee remissions doubling from $31.6 million in 2005-06 to $66.3 million in 2010-11.**

Acknowledging the importance of affordability, the Board has established targets for using campus funds to address unmet student need. With the passage of SB 242, OUS gained the ability to maintain all interest earnings in the Oregon University System Fund that, in the past, went back to the state General Fund pool, including earnings on tuition revenues. These funds now remain with the individual campuses to increase affordability through need-based financial aid.

The examples to the right illustrate some of the effective institutional aid programs that help make college affordable and accessible for students and families. All OUS institutions provide need-based Supplemental Educational Opportunity Grants (SEOG) to eligible students and, per federal regulations, give priority to those students with exceptional financial need and Pell Grant recipients. All OUS institutions also offer need-based federal College Work-Study Program (CWSP) opportunities, as well as numerous part-time "earn while you learn" job opportunities that are institutionally funded, some of which also offer academic credit.

Examples: Campus Affordability Strategies

Bridge to Success – OSU provides campus-based financial aid which covers tuition and fees with gift funding for students who are eligible for OOG and Pell Grants. Institutional funding is used to fill any gap that OOG and Pell Grant funds don't meet. The neediest students receive gift aid to cover books and supplies.

PathwayOregon – UO promises to cover four years of tuition and fees for Oregon residents who have at least a 3.4 high school GPA and are eligible for Pell Grants, 44% of whom are first-generation college students. In addition, these students have access to academic support and career guidance.

Diversity Commitment Scholarship – WOU: in addition to scholarships that offset tuition costs, the program offers 1st-year classes, intensive academic monitoring, and annual academic planning for 70+ Diversity Scholars from underrepresented groups whose communities otherwise lack "college knowledge".

Student Borrowing Extends Access, but also Concerns

Student loans are a critical tool that allows access to higher education for many who would not otherwise be able to afford college. Loan decisions by students should be balanced with expected returns on investment in their college degree (e.g., expected income) so that loan repayment is manageable. For the OUS Class of 2011, approximately 59% of bachelor's degree recipients had taken out a student loan and the average debt per borrower at graduation was $23,839, close to the national average of $23,065 for public universities. The student debt of Oregon public university graduates is 27% higher than its level five years ago ($18,808 for the graduating class of 2006) [4], while OUS tuition increased approximately 37% in this period. The **upward trend in debt, which is also seen nationally, has motivated**

[4] Sources: College-insight.org, Institute for College Access & Success, OUS Fact Book.

campuses and the System office to look for ways to proactively address student debt such as wise borrowing, financial management, and default prevention counseling, among other strategies.

Since career earnings vary considerably depending on the degree earned, students are well-advised to know what the debt-to-income ratio is for their specific field of study and career path to guide their decisions about how much student loan debt to incur. Unfortunately, with reduced state support and increased tuition, students who have to exceed reasonable borrowing levels may face potential problems during repayment. Some students, especially low-income and first-generation students, may decide to forgo certain programs and/or graduate school due to already high debt loads and concern about the ability to repay. **From a state policy perspective, Oregon must continue to examine the balance of loans and grants and the need for continued need-based aid increases through the OOG and other state and private resources.**

College Savings (529 Plans)

Prepaid tuition, especially in the form of a tax-deferred 529 plan, is a popular way to save for college and to keep borrowing levels and use of current income down during the college-going years. Key benefits of a 529 plan include: (1) contributions are tax deductible up to the first $4,345 for joint filers, (2) the funds can be used at any college nationwide, and (3) the donor retains control of the account and can decide how funds are spent. As of September 2012, there were 126,871 beneficiaries in the Oregon 529 College Savings Network, and total assets of $1.5 billion.

Affordability through College Preparation

Besides financial aid, there are a number of options for students and their parents in Oregon that can not only lower the sticker price but can better prepare students academically for college and accelerate their time-to-degree, as well. The Oregon University System coordinates and collaborates on numerous **pre-college programs and opportunities that provide college credit**, enabling a student to often skip one or more terms in college, thus saving thousands of dollars in tuition costs. High school students can take college credit courses in many schools across the state—such as Advanced Placement (AP), International Baccalaureate (IB), or dual credit coursework—that provide college credit and are offered in the high school or sometimes at a nearby college.

Lowering College Costs through Planning and Advising

While it takes many students five to six years to graduate today, finishing in four years is possible and can lower overall college costs. **The key to a more affordable 4-year completion is careful planning and student support** throughout college by advisors, faculty, and other support services. While some support services and class and course sections have been cut during periods of budget reduction, students can still meet with advisors as freshmen to carefully plan courses and credits to be taken to complete college in as close to four years as possible. The longer a student is in college, the more expensive the total cumulative cost. If students and/or parents are borrowing to pay tuition, this forward planning will keep loan costs lower and get the student into the workplace faster. Students and families can also save money every step of the way through closely **evaluating decisions in regard to the non-tuition costs of a college education—room and board, books and supplies, and personal expenses** such as transportation—taking advantage of campus cost-saving opportunities when available such as text book rental programs, multiple occupancy housing, and others.

TUITION EQUITY IN OREGON (HB 2787): CREATING A PATHWAY FOR ALL STUDENTS TO SUCCEED AND CONTRIBUTE

Issue Summary

Tuition equity is a term used to describe the provision of in-state tuition to students who are technically "undocumented" based on their parents' legal residency status. Many of these students have attended some or all of their K-12 education in the U.S., but due to the status of their parents, must pay out-of-state tuition at Oregon University System campuses.

Tuition Equity legislation through **House Bill 2787, which was recently passed by the House,** would allow some of these students who have attended an Oregon K-12 school for a certain period of time to pay in-state tuition, earn a degree, seek legal status, and be able to contribute fully as Oregon taxpayers and citizens.

Oregon Legislation in 2013 Session

In summary, HB 2787 states that undocumented students would be eligible for in-state (resident) tuition at an OUS institution if they meet certain requirements, including:

(1) attending an elementary or secondary school in the U.S. for at least five years and in Oregon for at least the last three years of that time before getting a diploma, or equivalent, or leaving school;
(2) enrolling in an OUS institution within three years of getting a diploma, or equivalent, or leaving school; and
(3) showing intention to become a citizen or lawful permanent resident of the United States by filing an affidavit with the OUS institution, stating that they attend/plan to attend and that they have filed an application to legalize their immigration status, or will do so when they are eligible.

A student would continue to qualify for in-state tuition for a maximum of five years after initial enrollment.

Broad Support for Tuition Equity

For several biennia, the Oregon Student Association has sought legislation on tuition equity. On March 4, 2011, the State Board of Higher Education unanimously endorsed tuition equity legislation, and asked the Oregon Legislature to support the adoption of it. Previously, in May 2010, the Board approved a resolution related to the national DREAM Act (see side bar), to ensure a strong future workforce and economy, and to support students who have

National and States' Effort

There is legislation at the national level for Tuition Equity called the DREAM Act, which was voted on in 2011 but did not receive approval. The DREAM Act (Development, Relief, and Education for Alien Minors) is bipartisan legislation to clear up the immigration status of and address federal barriers to education and work confronted by the U.S.-raised children of undocumented immigrants. A growing number of states have passed a version of Tuition Equity legislation, including Washington, Texas, Utah, New Mexico, Oklahoma, Nebraska, Illinois, New York, and California; and there are several other states that have bills related to Tuition Equity pending in their legislatures.

President Obama's recent 2012 Executive Order to temporarily allow eligible immigrants to apply for work permits and get a two-year deportation deferral for a period may help some students in Oregon, but it does not address in-state tuition for undocumented students. The Oregon Legislature still needs to pass legislation to allow for this.

succeeded in their secondary education in Oregon, often with distinction, and who will contribute to Oregon's communities in the years to come.

A Matter of Equity and Economy

Proponents of Tuition Equity believe that graduates of Oregon high schools who are undocumented students should have the opportunity to attend an Oregon public university to continue their education. Many of these students have worked very hard to earn a diploma, some performing at the highest levels, and deserve a chance to go to college, while showing intent to work towards gaining a legal status.

Tuition Equity is a way forward for Oregon's economy as well. Growth in the Latino student population is leading the demographic increases for young people in Oregon. The state needs all students to be highly skilled and educated in order to ensure we have the workforce strength that our current companies demand, and which we need to attract more companies and jobs in the future.

Financial Aid for Undocumented Students

Even if undocumented students are able to pay in-state tuition, they will not necessarily be able to afford to attend an OUS institution because they are not eligible for state or federal financial aid, such as the Oregon Opportunity Grant and Pell Grants, since they are not U.S. citizens or permanent residents. But eliminating the hurdle of having to pay out-of-state tuition would be a major step toward helping undocumented students gain access to a higher education and to a legal status.

Estimated Use of Tuition Equity

It is difficult to quantify how many students would take advantage of the changes brought about by the passage of a tuition equity bill. From information provided by states that allow undocumented students to pay resident tuition under certain circumstances, the number of students using the program has not been large – from "a handful" to a few hundred.

The OUS fiscal impact for 2013-2015 of Tuition Equity, should it pass, has been estimated to be a net revenue gain of $334,820 (assuming an increase of 41 students); and for 2015-2017, a net revenue gain of $1.6 million (assuming an increase of 163 students). These figures represent an enrollment of fewer than 15 students per campus and, thus, no additional faculty would need to be hired to handle these increases. This also assumes that none of these students currently attend an OUS institution and pay nonresident rates.

2012 PathwayOregon Cohort Student Profile

(with comparisons to new Non-PathwayOregon Resident Freshmen enrolled full-time)

New Fall 2012 Pathway Oregon Students

	Count
PathwayOregon (total)	396
PathwayOregon with Housing	26

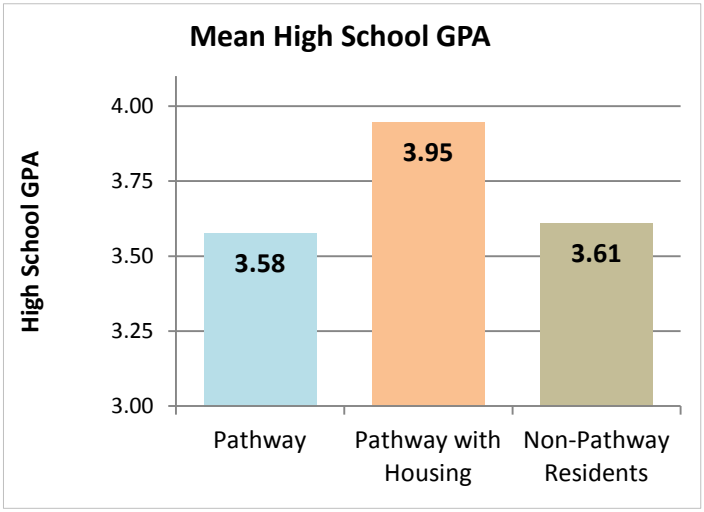
Admitted to Clark Honors College

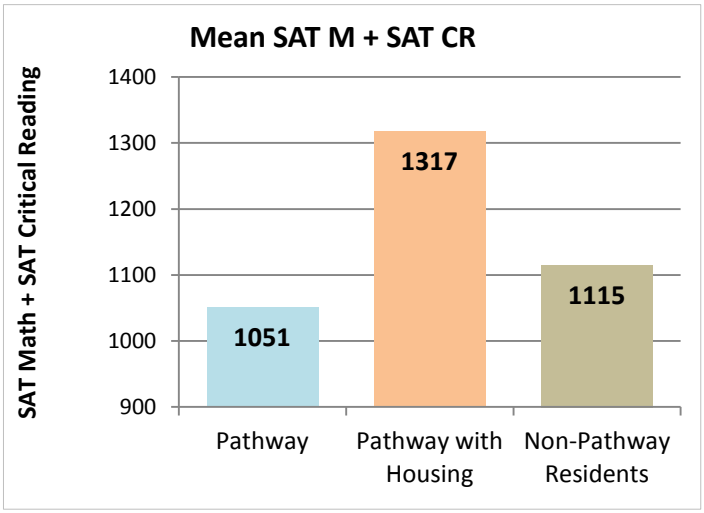
	Count	Percent of Population
PathwayOregon	22	6%
Non-Pthwy Resident Frshmn	141	9%

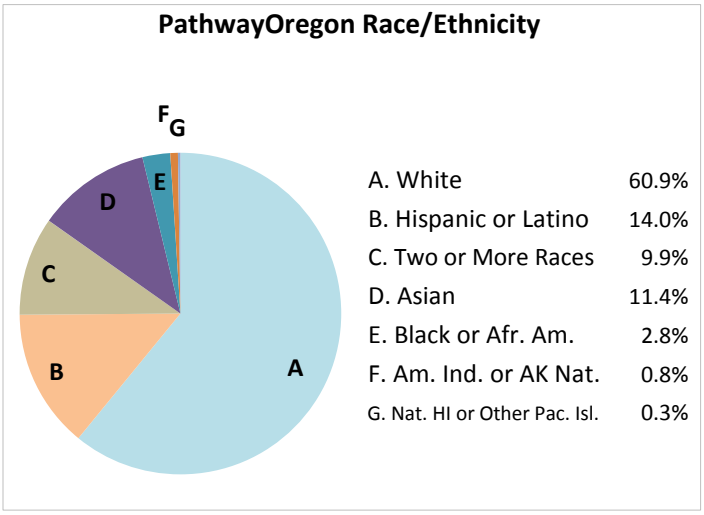
First Generation Students

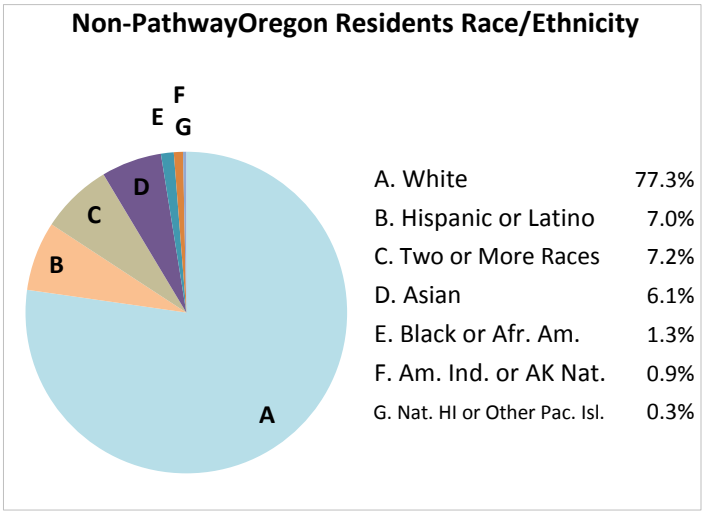
	Count	Percent of Population
PathwayOregon	190	48%
Non-Pthway Res Frsh with filed FAFSA	245	19%

Scholarship Recipients	Percent of Population	
	Pathway	Non-Pathway Res Frshmn
Presidential	1.0%	3.3%
Dean's	34.3%	38.9%
Diversity Excellence	8.1%	1.9%
General University	6.6%	5.3%









2012 PathwayOregon Cohort Student Profile

(with comparisons to new Non-PathwayOregon Resident Freshmen enrolled full-time)

Admit Majors

PathwayOregon Freshmen	
Major	Percent of Population
Undeclared-No major designated	36.4%
Pre-Business Administration	9.8%
Psychology	9.6%
Biology	6.1%
Human Physiology	5.1%
Pre-Journalism	4.8%
Pre-Education	3.0%
Computer & Information Science	2.5%
Biochemistry	2.3%
History	1.8%
Political Science	1.8%
Chemistry	1.3%
General Science	1.3%
Anthropology	1.0%
English	1.0%
Mathematics	1.0%
Music	1.0%
Physics	1.0%
Sociology	1.0%
Art	0.8%
Dance	0.8%
Spanish	0.8%
Cinema Studies	0.5%
Economics	0.5%
Ethnic Studies	0.5%
Pre-Engineering	0.5%
Pre-Family and Human Services	0.5%
Architecture	0.3%
Chinese	0.3%
Comparative Literature	0.3%
Digital Arts	0.3%
Environmental Science	0.3%
Environmental Studies	0.3%
French	0.3%
Humanities	0.3%
Interior Architecture	0.3%
Japanese	0.3%
Linguistics	0.3%
Pre-Marine Biology	0.3%
Romance Languages	0.3%
Theater Arts	0.3%
All	100.0%

Non-PathwayOregon Resident Freshmen	
Major	Percent of Population
Undeclared-No major designated	34.8%
Pre-Business Administration	16.9%
Psychology	6.2%
Biology	5.6%
Pre-Journalism	4.5%
Pre-Education	4.1%
Human Physiology	3.8%
Political Science	3.0%
Economics	2.0%
Music	2.0%
English	1.6%
Biochemistry	1.2%
Mathematics	1.1%
History	1.0%
Chemistry	1.0%
General Science	0.9%
Computer & Information Science	0.8%
Physics	0.8%
Architecture	0.6%
Theater Arts	0.6%
Cinema Studies	0.5%
Environmental Studies	0.5%
Linguistics	0.5%
Material & Product Studies	0.5%
Pre-Family and Human Services	0.5%
Environmental Science	0.4%
Humanities	0.4%
Philosophy	0.4%
Anthropology	0.3%
Communication Disorders & Sci	0.3%
Digital Arts	0.3%
French	0.3%
Sociology	0.3%
Dance	0.3%
Pre-Marine Biology	0.3%
Art	0.2%
Interior Architecture	0.2%
Japanese	0.2%
Pre-Engineering	0.2%
All Others	1.1%
All	100.0%

2012 PathwayOregon Cohort Student Profile

(with comparisons to new Non-PathwayOregon Resident Freshmen enrolled full-time)

Geographic Origin

Rural/Urban[1] Distribution	Pathway	Non-Pwthy Res Frshmn
Rural	13.6%	9.3%
Urban	86.4%	90.7%

[1] Urban counties include all counties that make up a part of Oregon's six Metropolitan Statistical Areas (MSA) as defined by the Bureau of Labor Statistics.

County	Count	Rank
Baker	1	25
Benton	3	17
Clackamas	40	4
Clatsop	5	9
Columbia	4	13
Coos	2	18
Crook	2	18
Curry	2	18
Deschutes	31	5

County	Count	Rank
Douglas	12	8
Gilliam	0	NA
Grant	1	25
Harney	2	18
Hood River	4	13
Jackson	21	7
Jefferson	2	18
Josephine	5	9
Klamath	4	13

County	Count	Rank
Lake	0	NA
Lane	96	1
Lincoln	5	9
Linn	2	18
Malheur	1	25
Marion	29	6
Morrow	1	25
Multnomah	58	2
Polk	5	9

County	Count	Rank
Sherman	0	NA
Tillamook	1	25
Umatilla	2	18
Union	0	NA
Wallowa	0	NA
Wasco	0	NA
Washington	51	3
Wheeler	0	NA
Yamhill	4	13

State Senate District	Count
1 Roseburg	10
2 Central Point	9
3 Ashland	14
4 S. Lane/N. Doug	29
5 Coos Bay	9
6 Springfield	36
7 Eugene	41
8 Albany	2

State Senate District	Count
9 Molalla	6
10 Salem	11
11 Salem	14
12 Dallas	8
13 Hillsboro	9
14 Beaverton	13
15 Hillsboro	7
16 Scappoose	10

State Senate District	Count
17 Beaverton	11
18 Portland	19
19 Tualatin	13
20 Canby	12
21 Portland	6
22 Portland	7
23 Portland	7
24 Portland	25

State Senate District	Count
25 Gresham	8
26 Mt. Hood	15
27 Bend	29
28 Klamath Falls	7
29 Pendleton	3
30 John Day	6

State House District	Count
1 Gold Beach	2
2 Roseburg	8
3 Grants Pass	4
4 Central Point	5
5 Ashland	9
6 Medford	5
7 Roseburg	12
8 Eugene	17
9 Coos Bay	3
10 Newport	6
11 Central Linn/Lane	13
12 Springfield	23
13 Eugene	22
14 Eugene	19
15 Albany	1

State House District	Count
16 Corvallis	1
17 Scio	2
18 Silverton	4
19 Salem	7
20 Salem	4
21 Salem	11
22 Woodburn	3
23 Dallas	4
24 McMinnville	4
25 Keizer	4
26 Wilsonville	5
27 Garden Home	5
28 Aloha	8
29 Hillsboro	7
30 Hillsboro	0

State House District	Count
31 Clatskanie	4
32 Cannon Beach	6
33 Portland	5
34 Beaverton	6
35 Tigard	13
36 Portland	6
37 West Linn	8
38 Lake Oswego	5
39 Oregon City	8
40 Gladstone	4
41 Milwaukie	6
42 Portland	0
43 Portland	2
44 Portland	5
45 Portland	2

State House District	Count
46 Portland	5
47 Portland	13
48 Happy Valley	12
49 E. Multnomah Co.	4
50 Gresham	4
51 Clackamas	7
52 Hood River	8
53 Sunriver	8
54 Bend	21
55 Medford	3
56 Klamath Falls	4
57 Heppner	1
58 Pendleton	2
59 The Dalles	2
60 Ontario	4

2012 PathwayOregon Cohort Student Profile

(with comparisons to new Non-PathwayOregon Resident Freshmen enrolled full-time)

Family Income

	Parent and Student Combined Income[2]		
	Median	25th Percentile	75th Percentile
Pathway	21,361	13,043	33,657
Non-Pathway Res Freshmn	95,322	63,733	137,223

[2] Family Income is only available for students who submitted a Free Application for Federal Student Aid (FAFSA).

Oregon University System

CAPITAL CONSTRUCTION PROGRAM: BACKGROUND DOCUMENTS

Monday, March 25, 2013

Oregon University System

2013 Legislative Issue Brief Higher Education

Capital Construction: Projects and Impacts

Investments Target Access, Sustainability, Safety, and Job Creation

Almost 120,000 students, faculty, staff and community members utilize Oregon University System campus buildings and property on a daily basis. These facilities provide the classroom, lab, and other spaces that enable OUS students to access the instruction and hands-on experiences they need to earn a degree and be successful the workplace. In recent years, increases in enrollment demand have compounded campus space issues with many classrooms, buildings, and labs in need of upgrading and repair in order to ensure the safe and conducive learning environment for today's graduates.

The 2011-2013 **Governor's Balanced Budget** (GBB) for OUS Capital Construction will maintain student access, protect and enhance the value of existing facilities, and create much-needed jobs on OUS campuses and facilities statewide**.**

Key features of the GBB for Capital Construction recommends a total investment of $608.8 million for 22 projects, including facilities repair and deferred maintenance on all campuses. This compares to $344 million received in 2011-2013. There is no Lottery-backed debt.

Investments in Capital Projects Translate into Jobs for Oregon

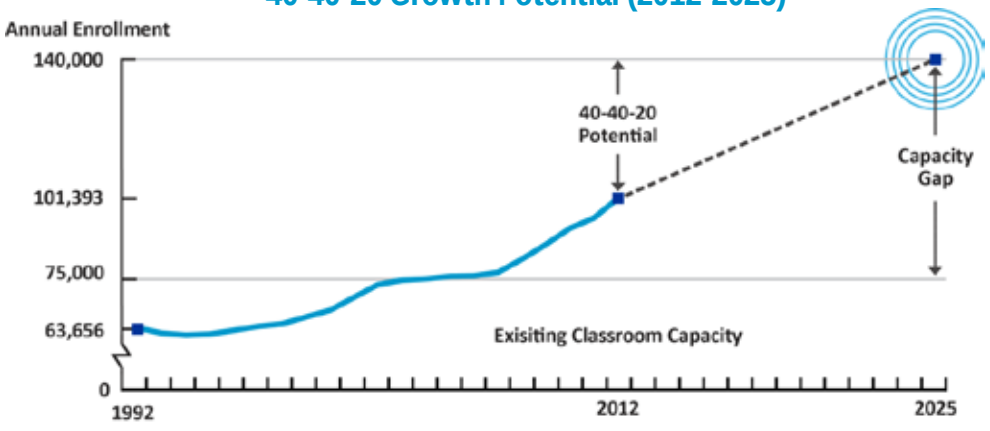
The direct economic impact from the 2013-2015 OUS capital request can be measured not only by the impact of new technologies and innovations that will be made available to State and its citizens as a product of these improved facilities, but also from the jobs created directly and indirectly by the construction activity. Based on past experience and estimates from the Associated General Contractors of America, OUS construction projects directly create nine jobs per million dollars of expenditure.

These **5,472** jobs related to the 2013-2015 capital request are high paying, living wage jobs, available throughout Oregon's seven geographically dispersed universities.

What are the Implications?

In order for the OUS institutions to assist the State in meeting its 40-40-20 goals for education, adequate facilities are needed to serve the increased student population. By 2025, OUS institutions will need to enroll roughly **140,000** students per year in order to reach the State's educational goals (currently, 101,393 students are enrolled Systemwide). The projected 40-40-20 enrollment increase will put significant demand on OUS institutions to provide adequate classroom and student space, as well as high-quality, technology-rich research facilities to ensure Oregon is producing the best-prepared, competitive workforce for the future.

40-40-20 Growth Potential (2012-2025)



Source: OUS Capital and Facilities Planning, based on data from OUS Institutional Research and 2012 Capacity Analysis by Sasaki and Associates.

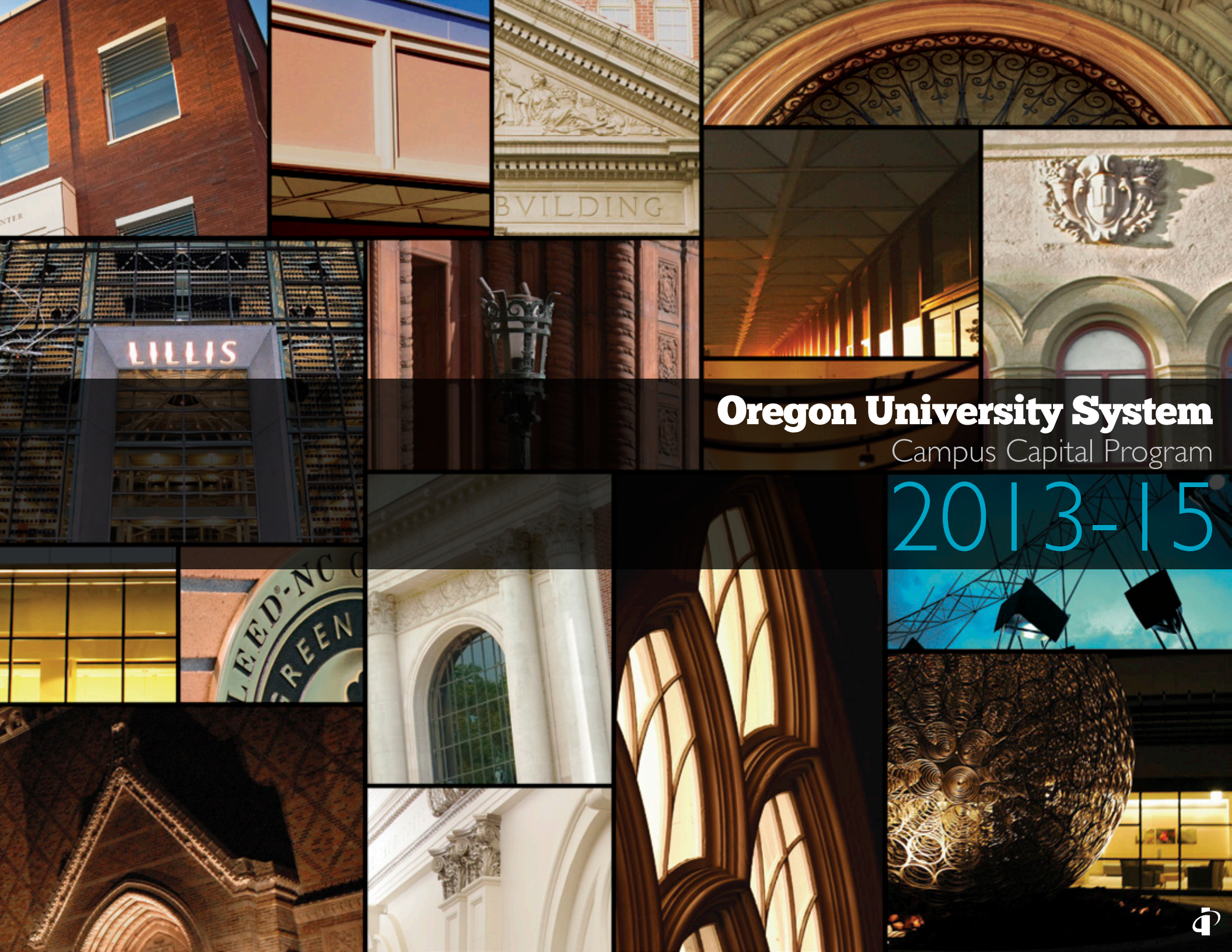
Capital Repair, Deferred Maintenance, and Safety investments of $102 million for all of the campuses are recommended in the GBB. These investments will limit the $600 million in current Systemwide deferred maintenance and $352 million in seismic backlogs from growing during the biennium. Investments will also help OUS to remain current with critical capital repair projects, code compliance, and safety issues—**including seismic upgrades.**

Student and campus community access is compromised when deferred maintenance of OUS facilities results in closure of facilities. By combining sustainable building practices and the latest seismic safety technology, the State will be able to retain the investments made by prior generations of Oregonians. The OUS will realize cost savings in the projects by doing the deferred maintenance and seismic work together. OUS facilities represent 50% of all state-owned facilities—approximately $7.5 billion in replacement value, making it an important system of assets to protect so that it can continue to serve Oregonians for many years to come.

Research completed by faculty and students on OUS campuses fuels the Oregon economy by producing the innovations that lead to commercial applications, new companies, jobs for Oregonians, and highly skilled graduates who help build a strong, diverse workforce. But many of the classrooms, laboratories, and research facilities are in critical need of upgrades and/or expansion in order to facilitate the student-learning and the research work critical to advancing Oregon's economic strengths and its diverse industries.

Projects

- **Oregon State University's Classroom Building:** Development of a classroom building and adjacent quad will accommodate significant enrollment growth that has occurred over the past decade, as well as project enrollment growth to meet the state's 40-40-20 goal. This project will construct a new 4-story, 130,000 square foot building to house general purpose classrooms (up to 2,500 seats), supporting all academic programs. The University Honors College will also be housed in the building.
- **Portland State University's School of Business Administration:** This project will modernize functionally obsolete space, address deferred maintenance needs and expand capacity to address the teaching, research, and service missions of one of PSU's most highly ranked programs. The building will provide 400 additional seats in 27 classrooms, 17 computer labs, and student team collaboration rooms to support the State's 40-40-20 goals. The building will also house new research and business incubation centers connecting students to the region's business and non-profit partners, a hallmark of the school's curriculum aligning with the State's economic development goals to produce a highly qualified business workforce.
- **Western Oregon University's New College of Education:** The project, submitted in support of the *Governor's Executive Order No. 12-16 to advance the innovative use of Oregon wood products,* will house a new College of Education. The project provides new instruction space to address growing enrollment in programs that represent approximately 35% of WOU majors and directly supports the 40-40-20 goal as well as PK-20 goals identified by the Governor.
- **University of Oregon's Straub and Earl Halls:** This project is the second phase of an earlier deferred maintenance project, and will add approximately 1,000 new classroom seats dedicated to general university use, including a highly needed 500+ seat lecture hall. By increasing the number of classroom seats, more class sections can be offered, which contributes to a shorter time to degree and allows more classes to be offered during the most sought after teaching and learning times.



Oregon University System

Campus Capital Program

2013-15

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March 6, 2013

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Acronyms Definitions

ADA
Americans with Disabilities Act

ASF
Assignable Square Feet

AUX
Auxiliary

CRV
Calculated Current Replacement Value

DEQ
Department of Environmental Quality

DM
Deferred Maintenance

DOGAMI
Oregon Dept. of Geology and Mineral Industries

E&G
Education and General

EPA
Environmental Protection Agency

FCI
Facilities Condition Index

FTE
Full Time Equivalent

GSF
Gross Square Feet

LEED
Leadership in Energy and Environmental Design

ODOE
Oregon Department of Energy

OSBHE
Oregon State Board of Higher Education

OSHA
Occupational Safety and Health Administration

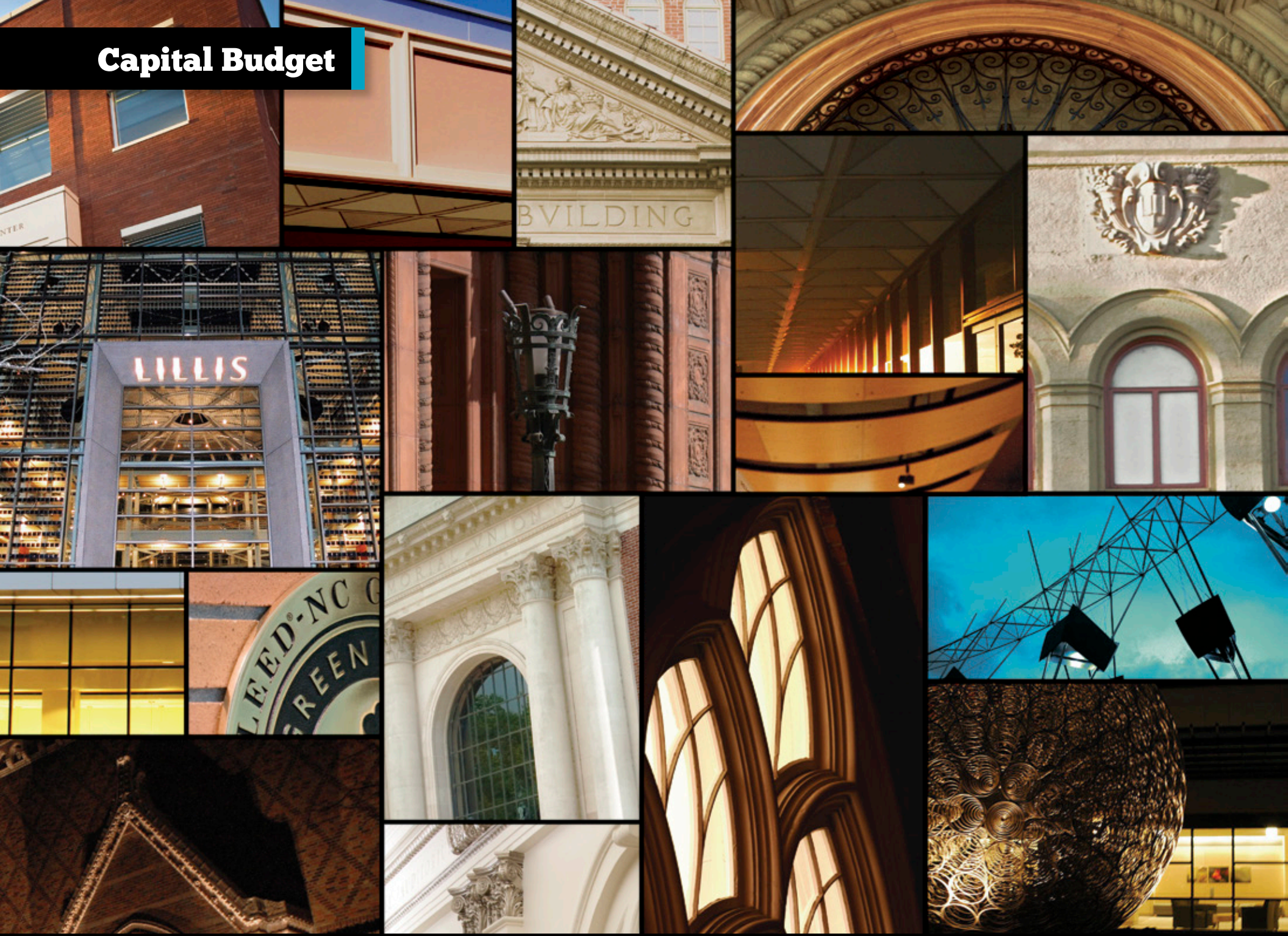
SYS
Systemwide

SBF
Student Building Fee

SEED
State Energy Efficiency Design

SELP
State Energy Loan Program

Capital Budget



Oregon University System
Campus Capital Program 2013-15

Capital Budget

Overview

Capital Budget: Quick Facts

Total Capital Projects	**22**	Deferred Maintenance Requested	**$102,000,000**
OUS Prioritized Projects	**8**	Total Gross Square Footage (GSF)	**1,591,647**
Total Capital Budget Request	**$608,780,000**	Total E&G Space (GSF)	**625,092**
State-Supported Bonding	**$172,200,000 (28%)**	Total Other Space (SBF, AUX, SYS)	**966,555**
Campus-Supported Funding	**$390,180,000 (64%)**	Average Project Cost/GSF	**$382**

Background

The State Board of Higher Education (Board) capital construction budget request to the Governor covers the ensuing five biennia. For 2013-2015, the capital construction budget request recommended by the Board to meet SB 253's 40-40-20 goal, totals over **$608 million in 22 projects across the State.** Campus Capital Construction investments target access, excellence, sustainability, safety, and job creation through the development, protection and enhancement of the State's university facilities in support of their teaching, research, and service missions.

Why Invest in Capital?

Universities have an uncommon commitment to place. This is particularly true in our diverse, geographically and culturally distinct state. Traditional community anchors – banks, newspapers and business enterprises that once defined and stabilized our cities and regions – are mobile. Universities and their campus assets are different. The investments are permanent, and each university stewards those investments in perpetuity for the campus and its community. Physical development, its quality and character, help to define regional identity.

Additionally, campuses are economic engines— in the short and long term. The State's investment in our university communities attracts further investment advancing job creation, and knowledge creation and dissemination, for the economy of the region and the state.

Economic Development opportunities that result from higher education investments are critical as Oregon recovers from the economic downturn. These include construction jobs, an educated workforce to meet the needs of the State's industry clusters, as well as research and development spin-offs that facilitate private sector investment and job creation.

Capital Planning Principles

Objectives	Key Issues	External Factors	Strategies/Solutions
• Increase Access	• Maintaining Affordability	• State's 40-40-20 Goal	• OUS Project Prioritization
• Meet Demand (Capacity)	• Controlling Cost	• Deferred Maintenance	• Increasing E&G Space
• Stimulate the Economy	• Prioritizing Needs	• Higher Student Expectations	• Project Cost Benchmarking
• Maintain Quality Assets	• Accommodating Enrollment	• Individualized Needs	• Capital Renewal Program
• Increase Competitiveness	• Providing Quality Education	• Market Fluctuations	• Cost-Effective Financing
• Improve Student Success	• Managing Limited Resources	• Regional Differences	• Efficient Project Delivery

Economic Development Potential

Economic Impact

The direct economic impact from the 2013-2015 OUS capital request can be measured not only by the new technologies that will be transferred to Oregon and its citizens as a product of these improved facilities, but also from the jobs created directly, and indirectly, from the construction activity.

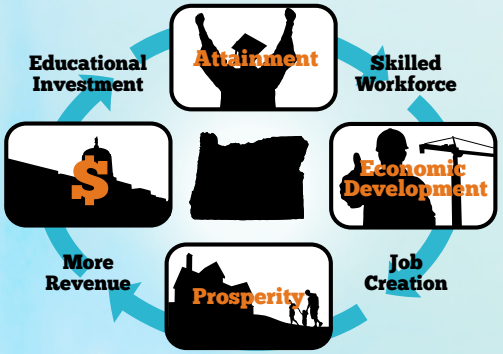
Based on past experience and estimates from Associated General Contractors of America, OUS construction projects directly create **9 jobs per million dollars of expenditure.**

These **5,472 jobs** related to the 2013-2015 capital request are high paying, family wage jobs, available throughout Oregon's seven geographically dispersed Universities.

Potential Jobs Created[1]	**5,472**
Potential Economic Output[2]	**$1.3 Billion**
Potential Earnings Increase[3]	**$852 Million**

Prosperity through Investment

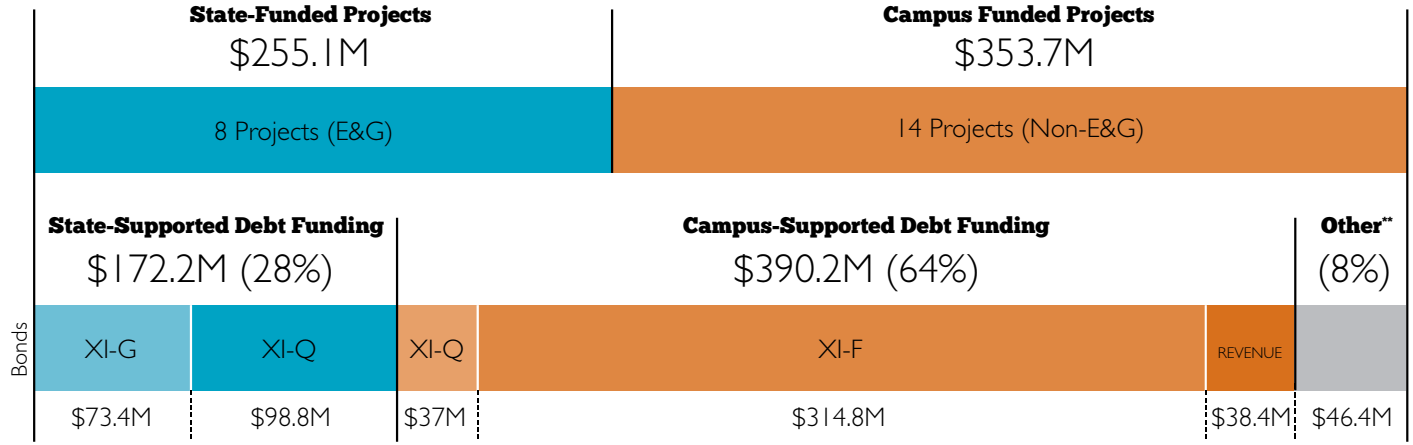
The Role of Education in Economic Development



[1] Based on Associated General Contractors estimate of 9 jobs per $1 million of expenditure
[2] Based on Bureau of Economic Analysis' RIMS2 Model Regional Economic Output Multiplier of 2.2 per $1 million of expenditure
[3] Based on Bureau of Economic Analysis' RIMS2 Model Regional Earnings Multiplier of 1.4 per $1 million of expenditure

2013-15 Governor's Balanced Budget (GBB) Capital Projects

Capital Budget: GBB Breakdown



GBB
$608.8M

State-Funded Projects (E&G)

OUS Ranking	OUS/GBB Ranking*	Campus	Project Name	Class	Type	Project Total	State-Supported Debt Funding	Campus-Supported Debt Funding	Other Funding**
1	1	PSU	School of Business Administration - Addition/Renovation	E&G	Add/Reno/DM	$50,000,000	$40,000,000	$0	$10,000,000
2	2	UO	Straub Hall and Earl Halls Classroom Expansion	E&G	Add/Reno	$22,000,000	$11,000,000	$0	$11,000,000
3	3	SYS	Capital Renewal Code and Safety	SYS	DM	$30,000,000	$30,000,000	$0	$0
5	4	OSU	Chemical, Biological, and Environmental Engineering Building	E&G	New	$40,000,000	$20,000,000	$0	$20,000,000
7	5	OSU	Classroom Building and Quad	E&G	New	$65,000,000	$32,500,000	$32,500,000	$0
7	5	WOU	New College of Education Facility	E&G	New	$18,600,000	$17,200,000	$0	$1,400,000
9	7	OSU	Cascade Campus Expansion	E&G	Acq/Reno	$24,000,000	$16,000,000	$4,000,000	$4,000,000
4	8	SOU	Theatre Arts Building Expansion and Remodel	E&G	Addition	$5,500,000	$5,500,000	$0	$0
Subtotal: Projects with State Funding						$255,100,000	$172,200,000	$36,500,000	$46,400,000

*OUS Revised Priority Ranking, as of January 9, 2013

**"Other Funding" refers to General Funds, Lottery Bond proceeds, gift funds or other funds available to the university for that purpose

- AUX — Auxiliary
- ACQ — Acquisition
- ADD — Addition
- E&G — Education and General
- DM — Deferred Maintenance
- GBB — Governor's Balanced Budget
- RENO — Renovation
- SBF — Student Building Fee
- SYS — System

2013-15 Governor's Balanced Budget (GBB) Capital Projects (Cont'd)

Campus-Funded Projects

OUS Ranking	OUS/GBB Ranking*	Campus	Project Name	Class	Type	Project Total	State-Supported Debt Funding	Campus-Supported Debt Funding	Other Funding**
1	1	OUS	Miscellaneous Student Building Fee Projects	SYS	All	$20,000,000	$0	$20,000,000	$0
2	2	OUS	Commercial Paper (Short Term Financing Pre-bonding)	SYS	All	$15,000,000	$0	$15,000,000	$0
3	3	OUS	Financing Agreements	SYS	All	$20,000,000	$0	$20,000,000	$0
4	4	OIT	InFocus Acquisition	E&G	Acq/Reno	$10,000,000	$0	$10,000,000	$0
5	5	OSU	Modular Data Center Facilities	E&G	New	$7,000,000	$0	$7,000,000	$0
6	6	OSU	Underground Communications Infrastructure	E&G	New	$10,000,000	$0	$10,000,000	$0
7	7	OSU	Real Estate Acquisitions	E&G	Acq	$5,880,000	$0	$5,880,000	$0
8	8	OSU	Housing and Dining Upgrades	AUX	Reno	$9,500,000	$0	$9,500,000	$0
9	9	PSU	Land Acquisition	AUX	Acq	$10,000,000	$0	$10,000,000	$0
10	10	SOU	Student Recreation Center	SBF	New	$20,000,000	$0	$20,000,000	$0
11	11	SOU	Cascades Hall Replacement	AUX	New	$7,000,000	$0	$7,000,000	$0
12	12	UO	Student Recreation Center Expansion and Renovation	SBF	Add/Reno	$50,250,000	$0	$50,250,000	$0
13	13	UO	University Housing Expansion	AUX	New	$84,750,000	$0	$84,750,000	$0
14	14	UO	Erb Memorial Student Union Expansion and Renovation	SBF	Add/Reno	$84,300,000	$0	$84,300,000	$0
Subtotal: Projects without State Funding						$353,680,000	$0	$353,680,000	$0
Total Request						**$608,780,000**	**$172,200,000**	**$390,180,000**	**$46,400,000**

*OUS Revised Priority Ranking, as of January 9, 2013

**"Other Funding" refers to General Funds, Lottery Bond proceeds, gift funds or other funds available to the university for that purpose

- AUX — Auxiliary
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- SBF — Student Building Fee
- SYS — System

2013-15 OUS Prioritized Projects

Remaining 2013-2015 OUS Prioritized Projects (Not Included in GBB)

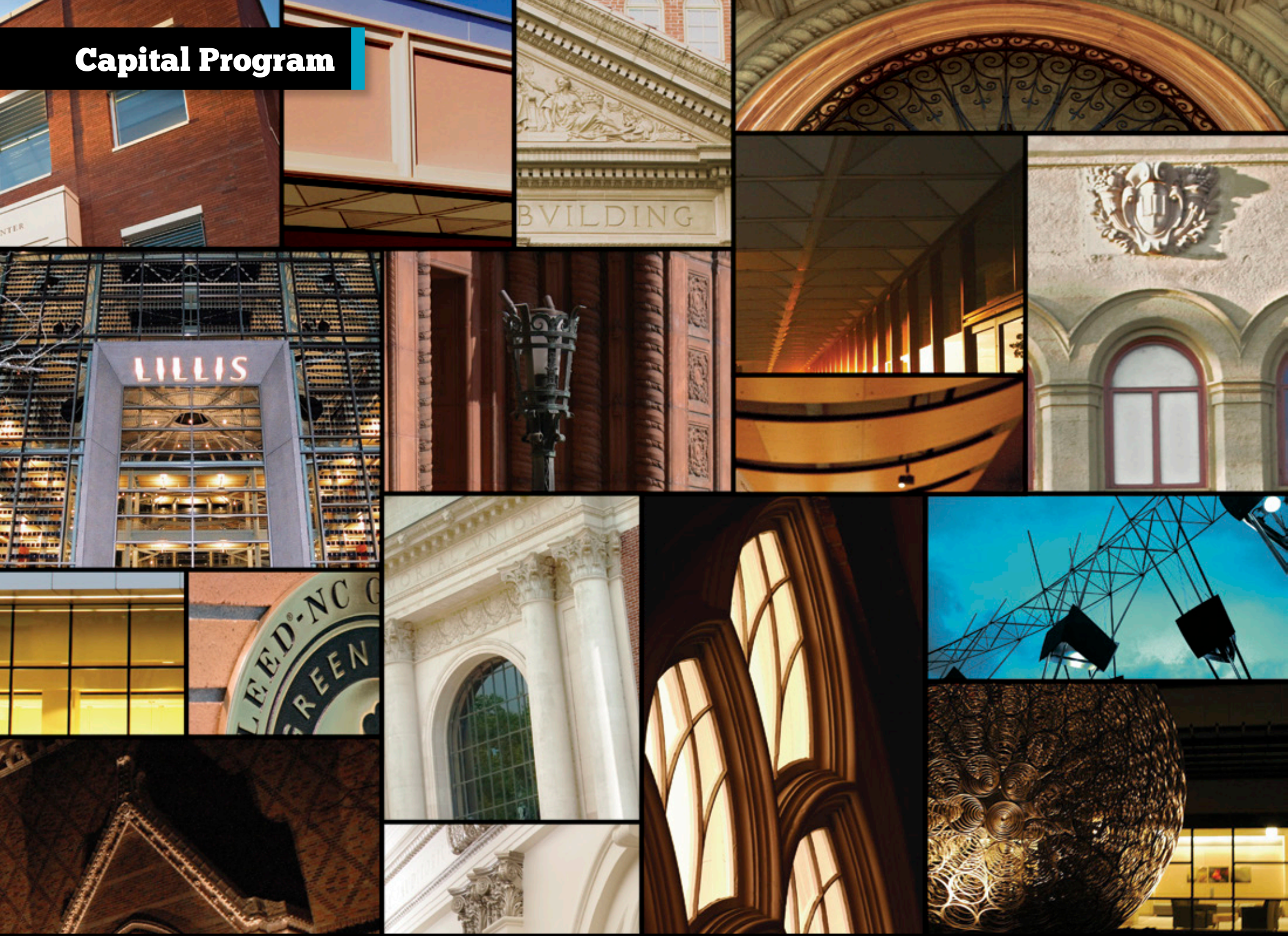
OUS Ranking	OUS/GBB Ranking*	Campus	Project Name	Class	Type	Project Total	State-Supported Debt Funding	Campus-Supported Debt Funding	Other Funding**
8	9	UO	Science Commons and Research Library Expansion/ Remodel	E&G	Add/Reno	$16,750,000	$8,375,000	$0	$8,375,000
6	10	OIT	Cornett Hall Renovation - Deferred Maintenance	E&G	DM/Renov	$2,000,000	$2,000,000	$0	$0
9	11	EOU	Eastern Learning Commons Planning/Design and Upgrades	E&G	New	$2,000,000	$2,000,000	$0	$0
4	12	PSU	Peter Stott Center Renovation and Expansion	E&G/AUX	Add/Reno/DM	$44,000,000	$22,000,000	$0	$22,000,000
3	13	SYS	Capital Renewal Code and Safety - Other E&G	E&G	DM	$10,000,000	$10,000,000	$0	$0
10	14	PSU	Neuberger Hall - Deferred Maintenance	E&G	DM	$42,500,000	$41,370,000	$980,000	$150,000
2	15	UO	Chapman Hall Renovation, Seismic Upgrade and DM	E&G	Renov/DM	$10,250,000	$7,375,000	$0	$2,875,000
11	16	UO	Huestis Hall 2nd Floor Renovation	E&G	Renov	$8,000,000	$4,000,000	$0	$4,000,000
12	17	UO	Global Studies Building	E&G	New	$18,250,000	$9,125,000	$0	$9,125,000
6	18	SYS	Research Collaboratory	E&G	New	$5,000,000	$5,000,000	$0	$0
13	19	SOU	McNeal Hall - Deferred Maintenance	E&G/SBF	DM	$15,875,000	$8,800,000	$7,075,000	$0
14	20	EOU	Inlow Deferred Maintenance - Phase 2	E&G	DM/Renov	$4,000,000	$3,737,000	$263,000	$0
15	21	PSU	City Tower Purchase and Renovation	E&G	Acq/Renov	$27,000,000	$13,500,000	$13,500,000	$0
Total Request of Remaining OUS Prioritized Projects						$205,625,000	$137,282,000	$21,818,000	$46,525,000

*OUS Revised Priority Ranking, as of January 9, 2013

**"Other Funding" refers to General Funds, Lottery Bond proceeds, gift funds or other funds available to the university for that purpose

- AUX — Auxiliary
- E&G — Education and General
- DM — Deferred Maintenance
- F — Article XI-F Bonds (Campus-Paid)
- G — Article XI-G Bonds (General Fund)
- M — Article XI-M (Seismic) Bonds
- L — Lottery-Backed Bonds
- O — Other Funding (Gifts, Grants)
- Q — Article XI-Q Bonds
- R — Campus Revenue Bonds
- S — SELP Loan Funds
- SBF — Student Building Fee
- SYS — System

Capital Program



Oregon University System
Campus Capital Program 2013-15

40-40-20 Goal

More Students, More Degrees

Having an educated workforce is essential to attracting and retaining industries that drive Oregon's economy. In 2011, the Oregon Legislature affirmed their commitment to raising the State's educational attainment by passing **Senate Bill 253.** The Bill sets an ambitious statewide goal known as "40-40-20", where by 2025:

- **40 percent** of Oregonians have a four-year degree or more,
- Another **40 percent** have an associate's degree or post high school certificate,
- And the remaining **20 percent** have a high school diploma or equivalent.

While many factors will contribute to achieving this goal, the outcome will undoubtedly increase the number of students in the higher education system.

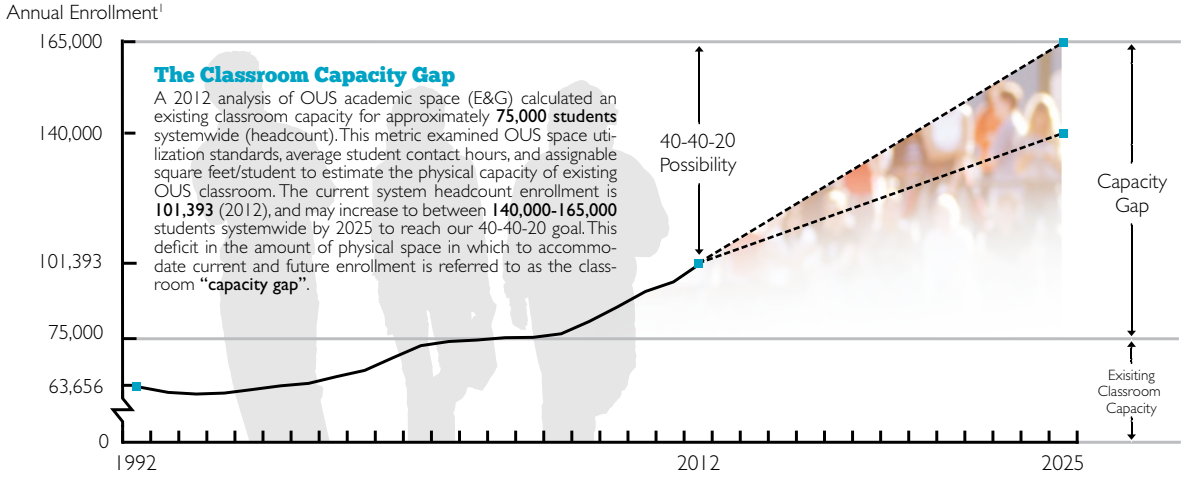
What are the Implications?

In order for the OUS institutions to assist the State in meeting its 40-40-20 goals for education, adequate facilities are needed to serve the increased student population.

By 2025, OUS institutions will need to enroll between **140,000 and 165,000 students** per year in order to reach the State's educational goals (currently, 101,393 students are enrolled systemwide).

The projected 40-40-20 enrollment increase will put significant demand on OUS institutions to provide adequate classroom, student space, as well as high-quality, technology-rich research facilities, to ensure Oregon is producing the best-prepared, competitive workforce for the future.

Systemwide Enrollment: Past, Present, and Future



Classroom Space
Accomodating Demand

Space Utilization

Accommodating enrollment is not solely a function of adding classroom space. How existing space is utilized during an institution's weekly schedule has equal significance. OUS prescribes a classroom occupancy standard of **33 hours/week**[2] (the average number of scheduled hours per week for a classroom), with each student station scheduled for and average of **20 hours/week** (or 60% of the classroom occupancy). Several factors contribute to variations in classroom utilization including changes in enrollment patterns, space configuration and quality, classroom seating capacity, and the availability of suitable space types and/or appropriate technology to serve program needs.

Time-to-Degree

The lack of available classroom space will increase the time necessary to complete a degree. Increased time to graduate not only results in a real increase in the total tuition paid by students, it also means that students will be delayed in starting their career and earning an income. For a student earning **15 credits per quarter**, an extra quarter would cost in the range of **$2,000 – 2,300** at today's tuition rates.

[1] Headcount Enrollment, 1992-2012; Source: OUS
[2] OUS Policy: Facilities Standards and Guidelines (Section 8.03 — Classroom Space Use Objectives)

No Class Room

Leaning Over to Learn

"No Class Room:
The UO Has Added Thousands of Students Without Adding the Space to Put Them In"*

By Diane Dietz
The Register-Guard

"Associate professor Jane Cramer said she doesn't want to be a whiner, but she has found herself teaching in some packed classrooms at the University of Oregon. Last year, the political science professor was assigned to a Condon Hall seminar room meant for 16 — and 22 students signed up for the class. Desks were jammed into the room within inches of her legs as she stood in front by the chalkboard, Cramer recalled. Cramer called the registrar's office to ask for a bigger room. 'I can't stand up there,' she remembers saying. 'I feel ridiculous leaning over this person for three hours.' But the scheduler's answer was, 'No,' Cramer said. All of the university's 163 classrooms were spoken for; she would have to make do.'"

"That's the story for increasing numbers of UO faculty and students as the university has admitted thousands more students but failed to build enough classrooms to house them. Enrollment is projected to top 25,000 this fall, which will mean the student body will have In the meantime, classroom schedulers have coped as best they can. They jam classes into departmental conference rooms, lease basement classrooms at a nearby church and at the private Northwest Christian University. They schedule more classes at 8 a.m. and 8 p.m. 'There are some buildings on campus that definitely could use some renovating,' said Ashland resident Abgail Young, who graduated with degrees in music and Spanish in June. She singled out the 50-year-old Prince Lucien Campbell Hall, the four-decade-old humanities complex on the west side of campus.'There just aren't enough classrooms in the school anymore. I've had plenty of classes where there weren't enough seats. People had to stand. My teacher tried to move, and there were no other empty classrooms. Definitely classrooms are really important.'"

"A shortage of large lecture halls is putting a lid on some classes, Eveland said. During the school year, the UO's single 500-plus seat lecture hall is packed from 8 a.m. through 7 p.m. each day with lectures in sociology, psychology, anthropology, chemistry and math. Meanwhile, human physiology classes are capped at 344 students, because that's the size of the next largest classroom, Eveland said. 'They have to stay at 344. They can't get any bigger than that,' she said. The registrar's office fields calls from professors each term who are seeking a larger classroom, Eveland said. 'We say, 'You can't raise the enrollment on that classroom past 50 (students) and we don't have a bigger room to give you," she said. 'The answer is almost always 'no.' We basically have no wiggle room. We have nothing.'"

"With the classroom squeeze coming on, university officials decided to convert a planned $22 million renovation of Straub Hall into a $44 million renovation-plus-addition project that would include a substantial, though undetermined, number of new classrooms. 'We said, 'Rather than just put back the classrooms we have there, let's see how many we can add," Ramey said. If the project goes ahead, the net gain for students and faculty will be 1,000 new seats spread among the classrooms, Ramey said. That's about half of the seats the UO needs to reach the ideal, he said. If the Straub Hall project is approved, the Legislature will provide half of the $44 million cost and the University of Oregon will have to also come up with half. The details of funding are not yet determined. If approved and fully funded on the hoped-for schedule, the revamped building would be ready for use in March of 2015."

* Excerpts from the story "*No Class Room: The UO has added thousands of students without adding the space to put them in,*" By Diane Dietz, The Register-Guard. Appeared in print: Sunday, Aug. 12, 2012, page A1

Campus Development

Capital Project Development Process

Design		Approval		Execution
Campus	**OUS Chancellor's Office**		**DAS[2]/Legislature**	**Campus**
Planning	Capital Funding Request	+	Governor's Balanced Budget	Contracting
Pre-Development	OSBHE[1] Project Prioritization		Legislatively Approved Budget	Construction
Feasibility	Agency Requested Budget		Bond Bill	Occupancy

[1]Oregon State Board of Higher Education
[2]State of Oregon, Department of Administrative Services

Campus Capital Project Prioritization – Capacity for 40-40-20

For over a decade, OUS has ensured the strategic investment of the State's limited resources through a rigorous review process. OUS project priorities are determined by assigning a point value to a set of seven criteria to measure the relative merits of each project proposal. The **Oregon State Board of Higher Education (OSHBE)** revised its project criteria weighting to better address critical issues of capacity for growth, financial performance and the use of leverage in evaluating each project proposals contribution to reach our 40-40-20 goal.

Reprioritization

At the Governor's request, the OSBHE reevaluated the capital project prioritizations submitted in OUS's Agency Request in terms of each project's performance toward meeting the state's 40-40-20 goal. OSBHE's reprioritization is based on the following criteria: ***1) serve more students; 2) serve students better; 3) the OUS Education and General prioritization criteria below; and, 4) explanation of the project's relationship to the other goals included in the Governor's budget, (e.g., Healthy People, Safety, Jobs and Innovation, Healthy Environment).*** OSBHE submitted its reprioritized project list to the Governor's office on January 9, 2013.

Education and General Prioritization Criteria **(100 Points)**

A. Master Plan: *(0 points)* Compliance with the campus master plan is required for project consideration.

B. Board Priorities: *(1 to 30 points)* Scoring is based on the project's relation to the Board's Strategic Plan: *"An Investment in Oregonians for our Future: A Plan to 2025 for the OUS"*. The first goal, *"Increase educational attainment to assure competitive strength for Oregon and its citizens"*, is interpreted to address access and capacity.

C. Cost Savings: *(1 to 10 points)* Projects are scored based on cost savings generated by eliminating or limiting deferred maintenance projects, and/or operational savings.

D. Need: *(1 to 10 points)* Scoring within this priority is related to Life safety, mission critical items, and projects that support key programs and initiatives.

E. Campus Priority: *(4 to 20 points)*

F. Finish What We Started: *(1 to 5 points)* Projects are scored based on how the capital investment could best enhance or complement existing academic program efforts.

G. Use of Leveraged Dollars: *(1 to 15 points)*

H. Sustainability: *(1 to 10 points)*

- Reduction of EUI from baseline State energy criteria (existing for renovations, target for new construction)
- Reduction of Water use from baseline
- Reduction of Waste from baseline
- Supply chain reduction renovation x points, new building with sourced material within 500 miles

Note: USGBC LEED Silver Equivalent and Oregon Department of Energy SEED are baseline for Energy

Prioritization
OSU Classroom Project

How Project Prioritization Works

OSU's 2013-15 capital request includes a proposed classroom building and adjacent quad. The project will consist of a new 4-story, 130,000 SF building to house general purpose classrooms **(up to 2,500 seats)** supporting all academic programs, as well as the University Honors College.

This project received a prioritization score of 80 (out of 100 possible), achieving a rank of 5 on the list of OUS prioritized projects. Below are the actual OUS scores:

- Board Priorities: *(1 to 30 points)* = *28*
- Cost Savings: *(1 to 10 points)* = *5*
- Need: *(1 to 10 points)* = *10*
- Campus Priority: *(4 to 20 points)* = *20*
- Finish What We Started: *(1 to 5 points)* = *5*
- Use of Leveraged Dollars: *(1 to 15 points)* = *8*
- Sustainability: *(1 to 10 points)* = *4*
- Total: *(100 possible points)* = *80*

This project was ranked high for adding much-needed classroom capacity, increasing the availability of classes and reducing the "*time-to-degree*".

Paradigm Shifts in Campus Development

Problem-Solving Through Innovation, Technology, and Community

The world is changing rapidly, and universities are at the forefront of identifying, analyzing, and embracing innovative trends that enhance efficiency, and build social, intellectual, and economic capital. The external influences of increased student enrollment, limited program and capital funding, high energy costs, and the critical role a university plays in a community are consistently evaluated, causing a major shift in how best a university can deliver resources that maximizes the potential for effective outcomes while being financially (and environmentally) sustainable. Advancements in technology have allowed universities to meet these challenges; and, in many ways, they have become laboratories for creating and implementing technologies to solve problems of the future.

Examples

- **EOU Pierce Library Renovation: How Technological Innovation is Enhancing Building Longevity**

  In 2012, EOU completed a $8M full building renovation of Pierce Library, a classic Art Moderne-era building, which became a warren of poorly functioning material storage, work and study rooms that no longer supported the mission of "creating and maintaining a dynamic environment, focused on service and guided by the principles of intellectual freedom, that encourages access to the cultural, historical and intellectual achievements of humankind." The reinvention was a paradigm shift from a material -focused facility to a user-focused facility through technology, efficient material management, and thoughtful design. Walls and floors were opened and barriers removed creating a light, vibrant, physically and visually connected environment. The reimagined facility expands space for users, creates individual and team study rooms and provides a usable and comfortable working environment for professional staff.

- **SOU Theatre Arts Building: How Drama Strengthens Campus/Community Identity**

  SOU has a special relationship with a community defined by theatre arts. Home of the renowned Oregon Shakespeare Festival (OSF), Ashland's very identity, both economically and culturally, revolves around theatre. SOU's Department of Theatre Arts employs OSF actors, directors, and designers as guest artists and adjunct faculty, so students work directly with professionals in their field. SOU's current theatre is under-sized for its enrollment demand. An expansion and remodel (approved by the Legislature in the 2011-13 biennium) will substantially increase the facility's size, adding much-needed new program space in addition to ensuring SOU has a theatre worthy of being designated an OUS Center for Fine and Performing Arts. Attracting top theatre students and faculty from across the country is not only important for establishing SOU and Ashland as integrated arts communities, but also supporting the economy of a region that depends a great deal on tourism.

- **Oregon Tech Renewable Energy: How a Major Energy User Became a Renewable Energy Powerhouse**

  Oregon Tech's Klamath Falls campus is home to the first geothermal combined heat and power plant in Oregon, and is currently the only university completely heated by geothermal water in the world. The 1.5 MW geothermal system, combined with a soon-to-be-completed solar array, will allow the campus to be entirely powered by renewable energy, and potentially return any net electricity production back to the grid. In addition to off-setting the university's carbon footprint and major energy costs (estimated at $3.3 million/year), Oregon Tech has become a leader in renewable energy technology, building academic programs in both its Klamath Falls and Wilsonville locations (including the nation's first Renewable Energy engineering degree), and serving as home to the Geo-Heat Center, a national clearinghouse for geothermal energy.


EOU's Pierce Library (Post-renovation)


SOU's Theatre Arts Building


Oregon Tech's Klamath Falls Campus Geothermal Heat Plant

Capital Project Funding

Capital Funding Sources

State-Supported Funding Sources

- **Article XI-G:** Defined by XI-G of the State Constitution, **Article XI-G** bonds may be issued to support E&G projects as long as they are matched equally by the General Fund, Lottery Bond proceeds, gift funds, or other funds available to the university for that purpose. Debt service on Article XI-G bonds is paid from the state General Fund within the operating budget. No appropriations are received for debt service in the biennium in which the bonds are approved.
- **Article XI-M:** Defined by XI-M of the State Constitution, **Article XI-M** bonds may be issued for projects that are related to seismic mitigation, for facilities in Higher Education, K thru 12, and emergency services related buildings. This was a new funding type for 2007, supported by state general funds.
- **Article XI-Q:** Defined by XI-Q of the State Constitution, **Article XI-Q** bonds may be issued for projects that are related specifically to acquiring, constructing, remodeling, repairing, equipping or furnishing real or personal property that is or will be owned or operated by the State of Oregon, including, without limitation, facilities and systems. In particular, XI-Q bonds provide a source of funds for technological enhancements, and may be campus and/or state-funded.
- **Lottery Bonds:** Oregon's **Lottery Bond** proceeds are used to support education, economic development, and natural resources programs. Administered by the Department of Administrative Services, with State Lottery Revenue pledged to pay the debt service.

Campus-Supported Funding Sources

- **Article XI-F(1):** Defined by XI-F(1) of the State Constitution, **Article XI-F(1)** bonds may be issued for projects that are self-supporting and self-liquidating. Each campus and auxiliary is responsible for their share of the debt service. Projects not selling bonds within two years may request reauthorization in succeeding Legislative session.
- **State Energy Loan Program (SELP):** **SELP** offers low-interest, long-term loans for any qualified Oregon project that invests in energy conservation, renewable energy, alternative fuels, or creating products from recycled materials. Oregon general obligation bonds provide the funds for the loans are structured so that energy savings and General Funds cover the loan payment. SELP loans may be campus and/or state-funded.
- **Higher Education Revenue Bonds:** Higher education **revenue bonds** are issued by the university system with the principal and interest secured by future campus revenues, including tuition and fees.

Other Funding Sources

- **Gifts, Donations, Grants:** Funding provided from donors or organizations to support capital projects and related programming.

Note: A debt burden ratio calculation (estimated through FY 2019) for each campus is located in the **Appendix**.

Capital Project Classification

Auxiliary (AUX)

- Funded primarily through the use of **Article XI-F(1)** bonds, repaid through revenues generated by the facility operations.
- **AUX Examples:** Campus Housing, Dining Facilities, Parking Lots/Structures, and Athletics Facilities.

Education and General (E&G)

- Eligible to receive state General Fund revenues and **Article XI-G** bonds, these facilities provide instructional space, administrative and campus support facilities necessary for the university.
- **E&G Examples:** Libraries, classrooms, research laboratories

Student Building Fee (SBF)

- A legislatively mandated fee paid by students each term that serves as the source of debt repayment. Capital construction projects are primarily funded through **Article XI-F(1)** bonds and repaid through revenues generated by operating the facility.
- **SBF Examples:** Student housing, Parking Lots/Structures, Student Unions, and Athletics Facilities.

Systemwide (SYS)

- An omnibus line item amount to cover academic modernization, code compliance, deferred maintenance and capital repair projects.
- **SYS Examples:** Projects that serve more than one campus are also proposed under this category.

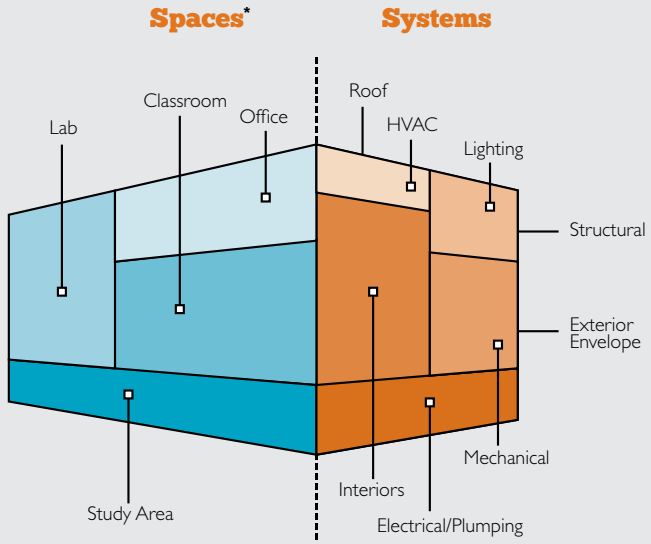
The University Building

Stewardship: Protecting Our Investments

University buildings are unique. These **revenue-generating** institutional facilities receive heavy use over generations of students. In many ways, university buildings are among the most enduring assets in the State. As such, stewardship of these assets informs the conception, design, construction, and ongoing management of campus facilities. How buildings perform, adapt, and are renewed over time is continuously evaluated in the planning process. OUS buildings strive to be:

- Pragmatic and Functional — *Every Square Foot is Used Effectively*
- Affordable — *Smart Initial Investment Ensures Low Life-cycle Costs*
- Healthy and Safe — *Environmentally and Structurally Sound*
- Durable — *Quality Materials to Withstand Intensive Use*
- Maintainable — *Designed for Ease of Maintenance*
- Flexible — *Readily Adaptable to Programmatic and Technical Changes*
- Sustainable — *High-performance, Low-energy Facilities with Locally-sourced Materials*
- Beautiful — *Inspires Pride in Both Campus and Community*

Anatomy of an Example University Building



Unique Attributes

Complex Mixed Use Buildings
- *Classrooms*
- *Teaching and Research Labs*
- *Housing and Dining Facilities*
- *Study Areas*
- *Offices for Faculty and Staff*

Intense Utilization
- *High Levels of Use and Occupancy: "24/7" Communities*
- *Students Living and Learning in the Same Environment*
- *Continuously-Evolving Needs*

Sense of Place
- *Institutional Buildings have Special Status*
- *Representative of a Campus, Community, and State*

Institutional and Statutory Requirements
- *Procurement, Project Controls, Documentation*
- *Contractor and Consultant Insurance Liability and Bonding*

Complex Execution in Operating Campus Environment
- *Premium Project Execution Costs to Ensure Safety and Security*
- *Short Construction Windows (Academic Calendar, Summers)*
- *Working in Occupied Areas (Building on and Active Campus)*

*E&G Spaces

Capital Renewal

The Deferred Maintenance (DM) Backlog

Like most colleges and universities across the country, almost 50 percent of OUS buildings were constructed within a 15-year window, from 1960 to 1975, in order to meet the huge enrollment growth attributed to the baby boomers. Now, over 40 years later, the major subsystems (roofing, HVAC, plumbing, electrical) within those buildings are wearing out and must be replaced.

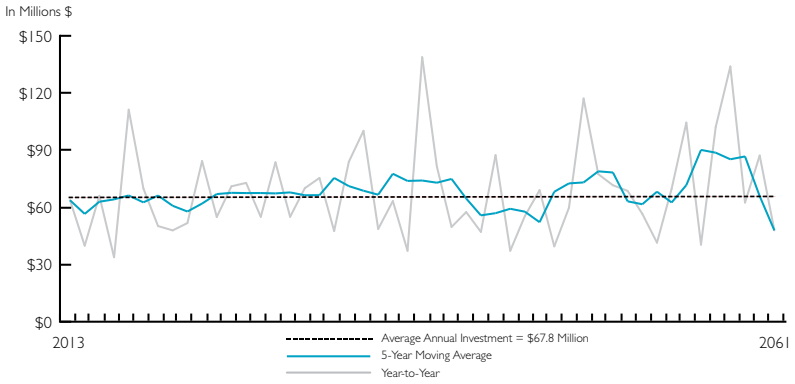
Oregon was one of the first states to develop a comprehensive plan to address deferred maintenance needs, establishing a "best-in-class" program to focus on critical life safety, code compliance and substantial renewal needs.

With limited state support to fund the periodic renewal of major building subsystems, a backlog of capital renewal projects has developed and has continued to grow to an astonishing **$600 million***, and will require an average biennial renewal investment of approximately **$135.6 million** to maintain a consistent level of stewardship (see **Appendix**). The following table provides a current capital renewal snapshot for all E&G facilities at OUS institutions.

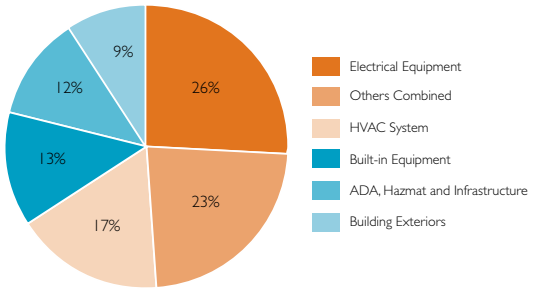
Capital Renewal Snapshot for 2012 (E&G Only)[1]

Campus	GSF	Calculated CRV** (000's)	DM Backlog (000's)	Seismic Backlog[2] (000's)	DM + Seismic/CRV (%)
EOU	585,481	$182,254	$18,186	$17,000	19%
OIT	468,211	$132,413	$33,250	$3,000	27%
OSU	4,454,036	$1,553,097	$154,886	$166,000	21%
PSU	2,414,452	$766,038	$168,581	$23,000	25%
SOU	865,645	$238,753	$18,147	$28,000	19%
UO	3,483,674	$1,165,618	$105,107	$73,000	15%
WOU	695,132	$191,431	$29,619	$40,000	36%
Total	12,966,631	$4.24 Million	$528 Million	$352 Million	21%

50 Year Renewal Curve



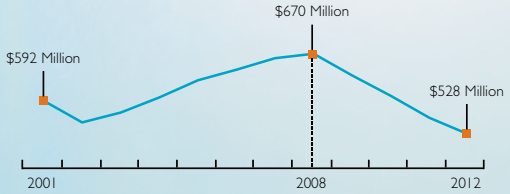
DM Backlog by Subsystem



Stewardship in Practice
How Are We Doing?

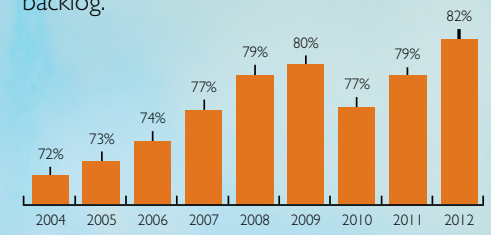
Deferred Maintenance Backlog

The accumulated dollar amount of systems and/or subsystems components that have exceeded the end of their useful life. From 2001 to 2012, the backlog decreased 7.6%; however, it increased significantly between 2002 and 2007 due to numerous subsystems reaching their end of life. In 2007, OUS concentrated on tackling this growing backlog through the Capital Renewal program. Since 2008, the backlog has **decreased by 27%**. Despite this progress, OUS will need to invest $135.6 million each biennum to maintain the backlog.



Net Asset Value (NAV)

An annual statistic that represents the aggregate condition of OUS buildings. NAV is expressed as a percentage and is calculated by subtracting the deferred maintenance backlog from the CRV and dividing it by the CRV. An NAV of 100% is a building with no backlog. OUS' NAV from 2004-2012 **increased 10%**, indicating progress in addressing the backlog.



Source: Sightlines, OUS 2012

*The calculated deferred maintenance backlog amount is $528 million. This figure does not include estimated needs for ADA improvements, hazardous materials abatement, and infrastructure upgrades. The aggregate cost of these needs is estimated to be an additional 14 percent of the total calculated amount, or approximately $600 million.
**CRV (Current Replacement Value): Calculated value for total building replacement (using the same construction and systems).
[1]Source: Sightlines, OUS 2012; [2]OUS Estimate from 2007 DOGAMI Study

Key Drivers of Cost

Why are University Buildings so Expensive to Build?*

Quality and Integrity
- Low Life-Cycle Cost: Built to Last
- Lower Maintenance Costs for Complex System
- High-Quality Building Systems and Envelope

Sustainability
- High-Performance, Low-Energy
- Institutional Requirements
- Local, State and Federal Mandates

University Distinctiveness
- Changes in Pedagogy
- Flexibility/Adaptability in Design
- Increased Building Technology and Complexity

Campus Design Standards
- Site Development Standards
- Building Architectural Design
- Campus Identity

The High Cost of Building Cheap

Portland State University's **Neuberger Hall** is one of the most heavily-utilized general-purpose classroom buildings on campus. It is estimated that over **532,560 students, faculty and visitors** use the building annually[1]. 169 faculty offices (over 10% of PSU's total faculty) and 35 classrooms (over 15% of all classrooms) are located in the building.

Neuberger Hall represents a typical university facility built in the US during the 1960s, constructed quickly and inexpensively to accommodate large enrollment increases due to the Baby Boom. While these buildings met short-term demand in an affordable way, their basic design and construction have made them less functional more quickly than other buildings, resulting in a **poor-quality learning environment**.

Further, these buildings have become substantially **more costly** over time to maintain, consistently underperforming in terms of longevity, due (in part) to their low quality of construction materials and poor physical design, requiring costly upgrades to meet current codes, seismic stability, energy efficiency, and programmatic needs.

Neuberger Hall – Built 1962, 1969
- 237,874 GSF
- Cost: $2.55 Million
- Cost per GSF: $10.70

Neuberger Hall – Today
- CRV (2012): $60,094,000
- DM2 (2012): $33,311,000
- FCI (2012): .55

Neuberger Hall – 2013-15 Request
- $8.5 Million in Seismic Upgrades
- $34 Million in Deferred Maintenance Addressed

Case Study
Lewis Integrative Science

Tearing Down Walls

"The **Lewis Integrative Science Building** at University of Oregon (UO) is designed to bring researchers from different disciplines together to spark fresh collaborations, inspire new research and yield innovative solutions to the grand challenges of tomorrow, today.

The building was designed for 'integrative science,' which involves bringing down the walls that separate biologists from chemists or psychologists.

The lab spaces within this new type of science building are shared. There are fewer private offices and more common spaces. In short, the whole building, from the basement to the fourth floor, is constructed around the idea that science is an open, collaborative process — not something to be conducted in isolation behind closed doors.

Not only will cutting-edge research be taking place inside the building, but students will be gaining critical thinking skills and gaining unprecedented access to interdisciplinary labs and high-tech tools and equipment."

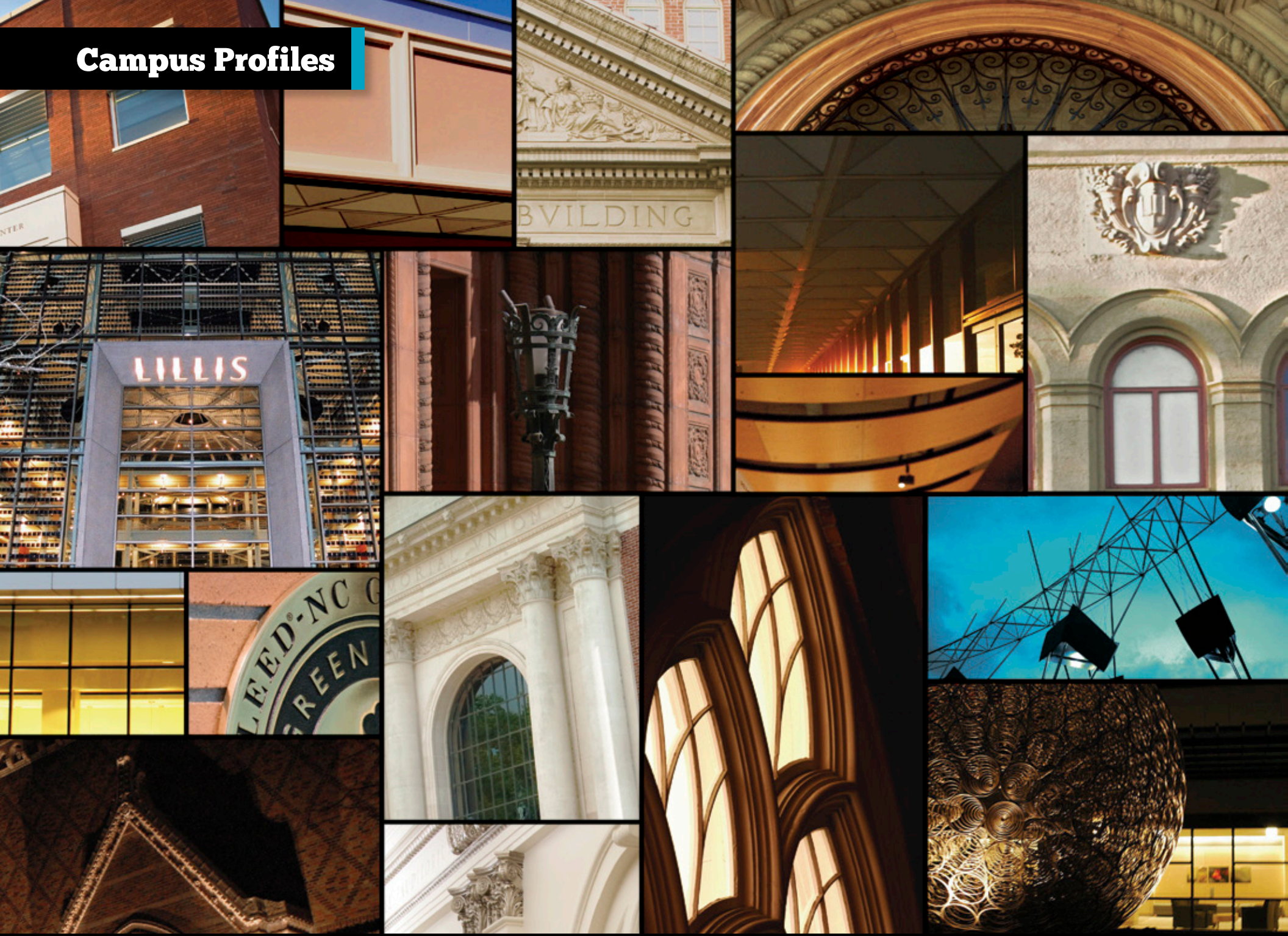
Source: Kimberly Andrews Espy, UO Science Building is Far Greater Than its Parts, The Register Guard, October 25, 2012.

*Additional lifecycle cost analysis and benchmarking is provided in the Appendix

[1] Based on 3,384 visitors and 3,373 students, 5 days per week, 8 weeks for 3 terms per year; Source: PSU Facilities

[2] Calculated Deferred Maintenance Backlog + Estimated ADA Compliance, Hazardous Materials Abatement, Telecommunications Upgrades, and Seismic Needs

Campus Profiles



Oregon University System
Campus Capital Program 2013-15

Oregon University System

Student Profile*

Enrollment (Headcount)	**101,393**
Undergraduate Students	**85,494**
Graduate Students	**15,899**
Degrees Awarded (2011-12)	**20,209**

Academic Profile

Institutions in System	**7**
Time to Degree (Years)[1]	**4.58**
6-Year Graduation Rate[2]	**54%**
Sponsored Research[3]	**$418,412,366**

Physical Profile

Campus Acres	**1,550**
Total Buildings	**1,020**
Total Gross Square Feet	**23 Million**
Ave. Renovation Age (E&G)	**40.5 Years**

Distinctions

- Oregon higher education has become a national model of innovation and leadership.
- OUS's performance-based productivity model, shaped by the State Board of Higher Education in 1997, continues to be nationally recognized for transforming higher education and making it more accessible and accountable to Oregon citizens.
- Among the full-time ranked instructional faculty of almost 2,900 are world-class artisans, scholars, scientists and teachers, many who have come to Oregon, like thousands of others, to fulfill the promise of a better way of life for this and future generations.

About OUS

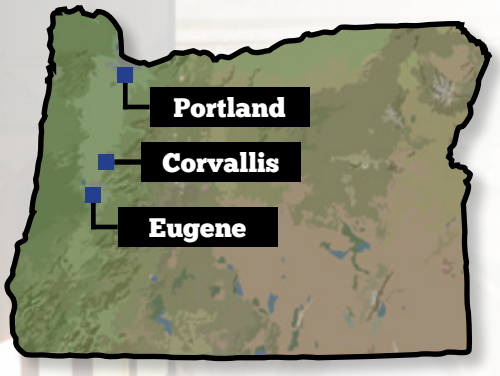
The Oregon University System's (OUS) seven diverse and quality-focused institutions — Eastern Oregon University (EOU), Oregon Institute of Technology (OIT), Oregon State University (OSU), Portland State University (PSU), Southern Oregon University (SOU), University of Oregon (UO), and Western Oregon University (WOU), and one branch campus, OSU-Cascades - provide higher education opportunities to all Oregonians who in turn enrich the economic and cultural base in the state.

OUS stewards 50 percent of all state-owned facilities equaling approximately 23 million square feet in over 1,000 buildings across the state. Over 100,000 students and 20,000 faculty, staff and community members utilize OUS campus buildings and property on a daily basis.

OUS campus facilities provide the classroom, lab, other spaces and technologies that enable students to access the instruction and hands-on experiences they need to be successful in degree attainment and in the workplace. With record enrollment demand, campuses continue to face space constraints, with classrooms, buildings and labs in need of upgrading and repair so they are safe and conducive to the research, learning and training needs of today's students and the state's employers to be globally competitive.

Facility Challenges

From a systemwide perspective, OUS's primary facility challenges focus on the stewardship of existing assets, addressing capacity issues, and ensuring fiscally-responsible projects. To that end, OUS works with each campus to address deferred maintenance, master plan development/updates, environmental sustainability, and developing projects that best serve students and meet the State's 40-40-20 goal.



*Source: OUS 2012
[1] 2010-2011, OUS Annual Performance Progress Report
[2] First Time Freshmen Entering (Fall 2005 Cohort): Excluding intra-OUS transfers: 54.0%, including intra-OUS transfers: 59.8%
[3] Includes Sponsored Research, Teaching/Training Grants, Student Services Grants, Library Grants, and Similar Support (2011-12)

Eastern Oregon University

Student Profile*

Enrollment (Headcount)	**4,208**
Undergraduate Students	**3,845**
Graduate Students	**363**
Degrees Awarded (2011-12)	**726**

Academic Profile

Bachelors Degree Programs	**24**
Masters Degrees Programs	**3**
Other Programs	**6**
Sponsored Research[1]	**$2,531,995**

Physical Profile

Main Campus Acres	**110**
Total Buildings	**26**
Total Gross Square Feet	**633,000**
Average Renovation Age[2]	**34.5 Years**

Distinctions

- Founded in 1929 as a teachers college, Eastern Oregon University (EOU) today serves as a regional university and center for education, culture and scholarship that offers 24 bachelor's degrees as well as graduate degrees in business, teaching and science in education, and partnership programs in nursing and agriculture.
- EOU is recognized for its commitment to student achievement and accessible education, in part thanks to its robust Distance Learning program (Online and On-Site) that accounts for over half of the University's enrollment.
- EOU recently completed a new Campus Master Plan that strives to meet the University's core themes of Quality, Access, Engagement and Affordability through contextual, sustainable physical design that celebrates the University's strengths and its important role in the region and in the Oregon University System.

About EOU

EOU is widely recognized for its commitment to student achievement and accessible education. The University continues to attract on-campus students from across Oregon, and has expanded its educational mission to provide distance-learning opportunities for off-campus students throughout the region. EOU views the development of its on campus and off campus facilities with emphasis on its core themes of Quality, Access, Engagement and Affordability.

Some of the ways that EOU will help ensure achievement of these include: focusing on capital investments that will improve student and faculty attraction, access and retention; investing in technology upgrades for flexible delivery (online and on-site); improving existing building utilization through programming, modernization, and renovations; reframing the physical campus infrastructure to be more environmentally and financially sustainable; and continuing to partner with local and regional jurisdictions on community education and economic development initiatives.

Focusing efforts in this way, EOU will continue to develop a campus that promotes quality of life for students, faculty, staff and the community. It will also prove provide thoughtful stewardship of scarce natural and financial resources.

Facility Challenges

EOU's primary challenge is connecting their Online and campus-based communities in a meaningful way. EOU envisions modest growth on campus, additional on-campus housing needs, and increased growth in distance learning. To accommodate this, the university will need to upgrade its existing data center and replace the partially unusable Hunt Hall, portions of which have been vacant since the 1970's and determined cost-prohibitive to renovate. Other facilities challenges include ADA access to all buildings and managing deferred maintenance.

*Source: OUS 2012
[1] Includes Sponsored Research, Teaching/Training Grants, Student Services Grants, Library Grants, and Similar Support (2011-12)
[2] E&G Only

Oregon Institute of Technology

Oregon TECH

Student Profile*

Enrollment (Headcount)	**4,001**
Undergraduate Students	**3,970**
Graduate Students	**31**
Degrees Awarded (2011-12)	**572**

Academic Profile

Bachelors Degree Programs	**31**
Masters Degrees Programs	**3**
Other Programs	**8**
Sponsored Research[1]	**$4,235,098**

Physical Profile

Main Campus Acres	**314**
Total Buildings	**34**
Total Gross Square Feet[2]	**1,038,982**
Average Renovation Age[3]	**29.2 Years**

Distinctions

- Oregon Institute of Technology (Oregon Tech/OIT) graduates enjoy an outstanding graduate success rate, with 90 percent either employed in their field of study or enrolled in graduate school within six months after graduation.
- The average starting salary for Oregon Tech graduates is $57,000 per year.
- Oregon Tech's engineering programs are ranked 35th in the nation by the 2013 "Best Colleges" edition of US News & World Report. The university as a whole is ranked 10th in the Best Colleges by Region, West category.
- In 2005, Oregon Tech was the first university in North America to offer an ABET accredited program in Renewable Energy Engineering. The program has had a 100% placement rate of its graduates into energy-industry jobs.

About OIT

Founded in Klamath Falls in 1947, Oregon Tech is the only public institute of technology in the Pacific Northwest. Oregon Tech provides degree programs in engineering and health technologies, management, communications and applied sciences that prepare students to be effective participants in their professional, public and international communities through hands-on learning.

Oregon Tech has a full-service, residential campus in Klamath Falls which is the only university campus in the world that is completely heated by geothermal water and has the first university-based geothermal combined heat and power plant (electric). Oregon Tech also has an urban campus in Wilsonville that offers a full portfolio of high demand programs that provide an industry-focused university experience. Additional Oregon Tech programs are located in Beaverton, Salem, La Grande, and Seattle, as well as Online.

Facility Challenges

Oregon Tech continually seeks to attract new and retain existing students. To meet expectations of a technology university, it is essential that key areas of the campus exemplify a state-of-the-art institution, provide desired resources, and show the value of attending Oregon Tech. Currently, there are buildings within Oregon Tech that only marginally meet programmatic infrastructure and technology needs.

The challenge is how to update Oregon Tech's facilities and still provide the best value to students without excessive tuition increases. Additionally, as a university with a technology-focused curriculum, it is imperative that Oregon Tech facilities are equipped with cutting-edge technology to attract top faculty and students. As the university's enrollment continues to grow, it is necessary for Oregon Tech to accommodate students with diverse needs, including ADA access and non-traditional, veteran and international student support.

*Source: OUS 2012
[1] Includes Sponsored Research, Teaching/Training Grants, Student Services Grants, Library Grants, and Similar Support (2011-12)
[2] Includes Oregon Tech's Wilsonville and Metro Center Facility Space
[3] E&G Only

Oregon State University

OSU

Student Profile*

Enrollment (Headcount)	**26,393**
Undergraduate Students	**21,184**
Graduate Students	**4,579**
Degrees Awarded (2011-12)	**5,052**

Academic Profile

Bachelors Degree Programs	**82**
Masters Degrees Programs	**77**
Doctoral Degrees Programs	**52**
Sponsored Research[1]	**$205,009,036**

Physical Profile

Main Campus Acres	**570**
Total Buildings	**223**
Total Gross Square Feet	**7,684,420**
Average Renovation Age[2]	**53.3 Years**

Distinctions

- Oregon State University (OSU) is a leading international public research university, attracting outstanding students and faculty who solve problems and make significant contributions throughout Oregon, the nation and the world.
- OSU's historic commitment to studying and conserving the natural world is recognized as among the best in the nation, providing guidance on issues ranging from climate change to marine reserves to forest management.
- As Oregon's land grant university, OSU serves Oregonians in every corner of the state providing education through undergraduate and graduate programs; practical, problem-solving research through the OSU Extension Service, Agricultural Experiment Stations and Forest Research Laboratories; and outreach and engagement programs in Oregon communities statewide led by 219 Extension faculty and 18,900 volunteers; to reach 2.3 million Oregonians, which represents two-thirds of the state's population.

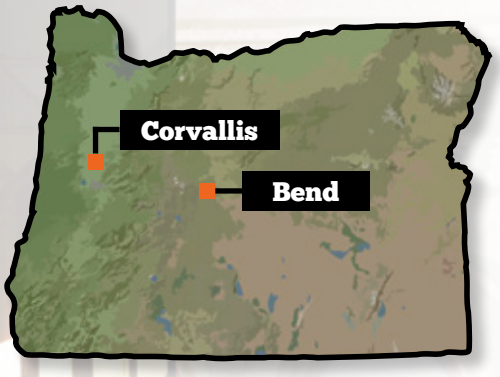
About OSU

OSU is a diverse, active, welcoming community. The campus combines historic beauty with state-of-the art facilities. Through its land grant mission of education, research and outreach programs, OSU is making a positive difference in the world by advancing the science of sustainable earth ecosystems; improving human health and wellness; and promoting economic growth and social progress. Students, faculty, researchers, staff and alumni work to improve quality of life in their communities and solve global problems.

OSU attracts top faculty from across the nation and around the world, who are recognized leaders in their respective fields. The university has developed and continues to grow a culture that values interdisciplinary collaboration. Research capabilities include specialized laboratories, equipment and one-of-a-kind facilities that are increasingly used by industry partners to solve problems and inspire innovation.

Facility Challenges

As OSU experiences growth in enrollment and with the number of faculty and staff it faces a challenge in effectively completing key repairs and replacement of its aging infrastructure. The loss of capital repair allocation and deferred maintenance funding for the last few biennia, and then a reduction of the amount that will be allocated in 2013, reduces OSU's ability to plan and complete improvements to its power grid, steam tunnel, streets, and complete capacity upgrades to its chiller loop system and electrical service to existing buildings. The strained infrastructure system is further impacted with the support requirements for new buildings.



*Source: OUS 2012
[1] Includes Sponsored Research, Teaching/Training Grants, Student Services Grants, Library Grants, and Similar Support (2011-12)
[2] E&G Only

Portland State University

Student Profile*

Enrollment (Headcount)	**28,731**
Undergraduate Students	**23,170**
Graduate Students	**5,561**
Degrees Awarded (2011-12)	**6,039**

Academic Profile

Bachelors Degree Programs	**99**
Masters Degrees Programs	**89**
Doctoral Degrees Programs	**38**
Sponsored Research[1]	**$69,506,106**

Physical Profile

Main Campus Acres	**53**
Total Buildings	**60**
Total Gross Square Feet	**5,434,180**
Average Renovation Age[2]	**43.6 Years**

Distinctions

- Through nationally reputed programs in business sustainability, urban planning, social entrepreneurship, undergraduate studies, and social work, Portland State faculty and students and faculty are making a difference in Oregon and across the Pacific Northwest.
- As a leading urban research university, PSU is a catalyst for innovation in start-up business development, design and testing of energy-efficient building, monitoring and modeling of traffic flow, and studying life in extreme environments.
- As the state's largest and most diverse university, Portland State is helping its students become successful scholars and citizens starting with its award-winning University Studies program for undergraduates.

About PSU

Portland State University (PSU), a 50-acre campus located in downtown Portland, is a nationally-acclaimed leader in sustainability and community-based learning. The University's position in the heart of Oregon's economic and cultural center enables PSU students and faculty to apply scholarly theory to the real-world problems of business and community organizations. Portland State offers more than 220 undergraduate bachelors, masters, and doctoral degree options, as well as graduate certificates and continuing education programs.

Facility Challenges

Enrollment has grown by over 40% in the last ten years, and the number of students residing on campus has grown by over 150%. Enrollment and research expenditures are expected to continue to grow, and demand is expected among most demographic groups and across most disciplines. The university is facing limits on their ability to further grow, due to inadequate classroom, research and student instructional and learning gathering space.

Despite being relatively young, PSU's facilities are quite old, due (in part) to the acquisition of existing buildings surrounding the campus as PSU has grown. Over 75% of university-owned buildings are over 25 years of age and approximately 40% of PSU's E&G space is over 50 years old, with most of these needing significant improvements and repairs.

The technical complexity of campus building systems continues to increase to accommodate advancements in research, teaching pedagogy and technology, and in some cases, requires buildings to be operated 24 hours a day, seven days a week. The full list of campus facility needs — estimated to be $220 million — is large and comprehensive, and includes deferred maintenance, fire and life safety improvements, environmental health and safety enhancements, energy efficiency upgrades and accessibility improvements.

*Source: OUS 2012
[1] Includes Sponsored Research, Teaching/Training Grants, Student Services Grants, Library Grants, and Similar Support (2011-12)
[2] E&G Only

Southern Oregon University

Student Profile*

Enrollment (Headcount)	**6,481**
Undergraduate Students	**5,817**
Graduate Students	**664**
Degrees Awarded (2011-12)	**1,002**

Academic Profile

Bachelors Degree Programs	**33**
Masters Degrees Programs	**15**
Other Programs	**13**
Sponsored Research[1]	**$2,528,401**

Physical Profile

Main Campus Acres	**175**
Total Buildings	**51**
Total Gross Square Feet	**1,350,000**
Average Renovation Age[2]	**32.2 Years**

Distinctions

- Southern Oregon University is the fine and performing arts campus of the Oregon University System.
- Environmental Studies and Outdoor Adventure Leadership are two academic programs that draw students from across the country to SOU.
- Southern Oregon University is nationally ranked as leader in sustainability, and is the first university in Oregon—and one of the first in the nation—to offset 100 percent of its energy use with clean, renewable power through energy credits.

About SOU

Southern Oregon University (SOU) is a renowned public liberal arts university in the West, attracting new freshmen and transfer students, while also drawing a growing share of its student body from California and other western states. SOU's appeal is based on three compelling offers: creativity, connected learning, and a unique environment that blends culture with a rich natural environment that is both an outdoor laboratory and a recreational wonderland.

As the fine and performing arts campus of the Oregon University System, SOU infuses creativity into every academic program, not just in the arts and sciences but also in professional studies such as business and education. SOU students thrive in an environment of small classes and close contact with professors. It's no wonder that over the last few years SOU has been one of the fastest growing public campuses in the state.

Facility Challenges

SOU's strong growth has put pressure on its aging physical plant. The original wing of the Science Building was constructed in 1959, and while it received approval for renovation in the 2011-2013 session, the building needs additional upgrades to all its systems.

The Theatre building currently serves three times as many students as it was designed. As a result, classes are taught in hallways, and office spaces that were intended for one person are occupied by three or four. The expanding School of Business is constrained by the other academic and auxiliary programs that it shares space with in Central Hall.

Other facility challenges involve the need for seismic remediation, an aging heating and power plant, and a majority of campus buildings was constructed prior to 1970. SOU's campus utilities are aging and major upgrades to the power plant and heating system are needed immediately. Two sewer lines recently failed and need to be replaced along with new water lines. The Science Complex, McNeal Hall and Britt Hall are all in dire need of seismic upgrades.

*Source: OUS 2012
[1] Includes Sponsored Research, Teaching/Training Grants, Student Services Grants, Library Grants, and Similar Support (2011-12)
[2] E&G Only

University of Oregon

Student Profile*

Enrollment (Headcount)	**24,591**
Undergraduate Students	**20,829**
Graduate Students	**3,762**
Degrees Awarded (2011-12)	**5,589**

Academic Profile

Bachelors Degree Programs	**77**
Masters Degrees Programs	**77**
Doctoral Degrees Programs	**43**
Sponsored Research[1]	**$118,590,837**

Physical Profile

Main Campus Acres	**295**
Total Buildings	**354**
Total Gross Square Feet	**7,661,186**
Average Renovation Age[2]	**45.4 Years**

Distinctions

- The University of Oregon is one of only sixty-one public and private institutions in the United States and Canada selected for membership in the Association of American Universities (AAU).
- The quality of faculty research is a point of pride at the University of Oregon, which consistently ranks high among research universities in attracting research grants, offering fellowships, and producing scholarly articles.
- The University of Oregon is a key driver of the Oregon economy - direct spending by the UO, students, and visitors, accounted for over $1.14 billion in FY2010-11. The total impact of this spending was nearly $2.12 billion.

About UO

The University of Oregon (UO), founded in 1876, is a comprehensive research university that offers academic excellence and hands-on learning opportunities in a welcoming atmosphere. UO provides a high-quality education to a large number of Oregonians at an affordable price, and maintains the highest graduation rate in the state.

Facility Challenges

UO's capital request addresses critical facility needs the campus is facing, and directly responds to recent enrollment increases by providing additional classrooms and renovations to existing classrooms. These improvements will increase the instructional capacity of the campus and the quality of interaction between student and professor in the classroom.

Chapman Hall, is home to the Clark Honor's College which attracts exceptional high school students and therefore supports Oregon's 40-40-20 plan by keeping the brightest students here in the state.

The Global Studies Building also increases the number of faculty offices needed to support the newly enrolled students. As the campus grows it needs to add facilities to enhance and retain its residential nature as represented by the Student Recreation Center and the University Housing expansion.

The Straub Hall, Chapman Hall, Science Library, and Huestis Hall projects take on the large backlog of unmet deferred maintenance items limiting the efficient operations of the buildings and degrading the quality of activities housed within them. These projects will lower energy use, renew worn out systems and finishes, and correct outstanding safety deficiencies.

The Science Library project will utilize best practice advances in research library use. Research is currently conducted across disciplines and the library for the 21st century creates the spaces needed for interdisciplinary teams of researchers to access information not currently available to them.

*Source: OUS 2012
[1] Includes Sponsored Research, Teaching/Training Grants, Student Services Grants, Library Grants, and Similar Support (2011-12)
[2] E&G Only

Western Oregon University

Student Profile*

Enrollment (Headcount)	**6,187**
Undergraduate Students	**5,387**
Graduate Students	**800**
Degrees Awarded (2011-12)	**1,229**

Academic Profile

Bachelors Degree Programs	**58**
Masters Degrees Programs	**12**
Other Programs	**11**
Sponsored Research[1]	**$10,160,599**

Physical Profile

Main Campus Acres	**157**
Total Buildings	**68**
Total Gross Square Feet	**1,356,228**
Average Renovation Age[2]	**45.2 Years**

Distinctions

- WOU serves a diverse student body where over 50 percent are first-generation college students; 20 percent come from traditionally under-represented backgrounds and include more than 10 percent of Latino heritage.
- WOU's was recognized by the Education Trust which named it both a top ten performer in the nation for improvement in graduation rates for underrepresented minority (URM) students, and the top university in the nation for closing the gap in graduation rates between Latino and non-minority students.

About WOU

As Oregon's oldest public institution of higher education, WOU's academic foundation is firmly placed on academic excellence and access to an affordable higher education. WOU's College of Education continues to receive national awards while attracting the next generation of teachers.

Programs of distinction such as Teacher Education, Special Education, and American Sign Language have experienced enrollment growth while teaching students the skills necessary for educating future generations of Oregonians.

Historically known for producing outstanding educators, our academic programs have successfully expanded into the liberal arts and sciences, with Business, Psychology, and Criminal Justice becoming the three most popular majors on campus. Complementing this growth is the rapid expansion within the sciences, especially those related to the health sciences and the collaborative nursing degree with the Oregon Health & Sciences University on our campus. Over the last five years, the sciences have experienced enrollment increases of over 36 percent, with biology and chemistry curricula experiencing enrollment increases of 43 and 79 percent, respectively.

Facility Challenges

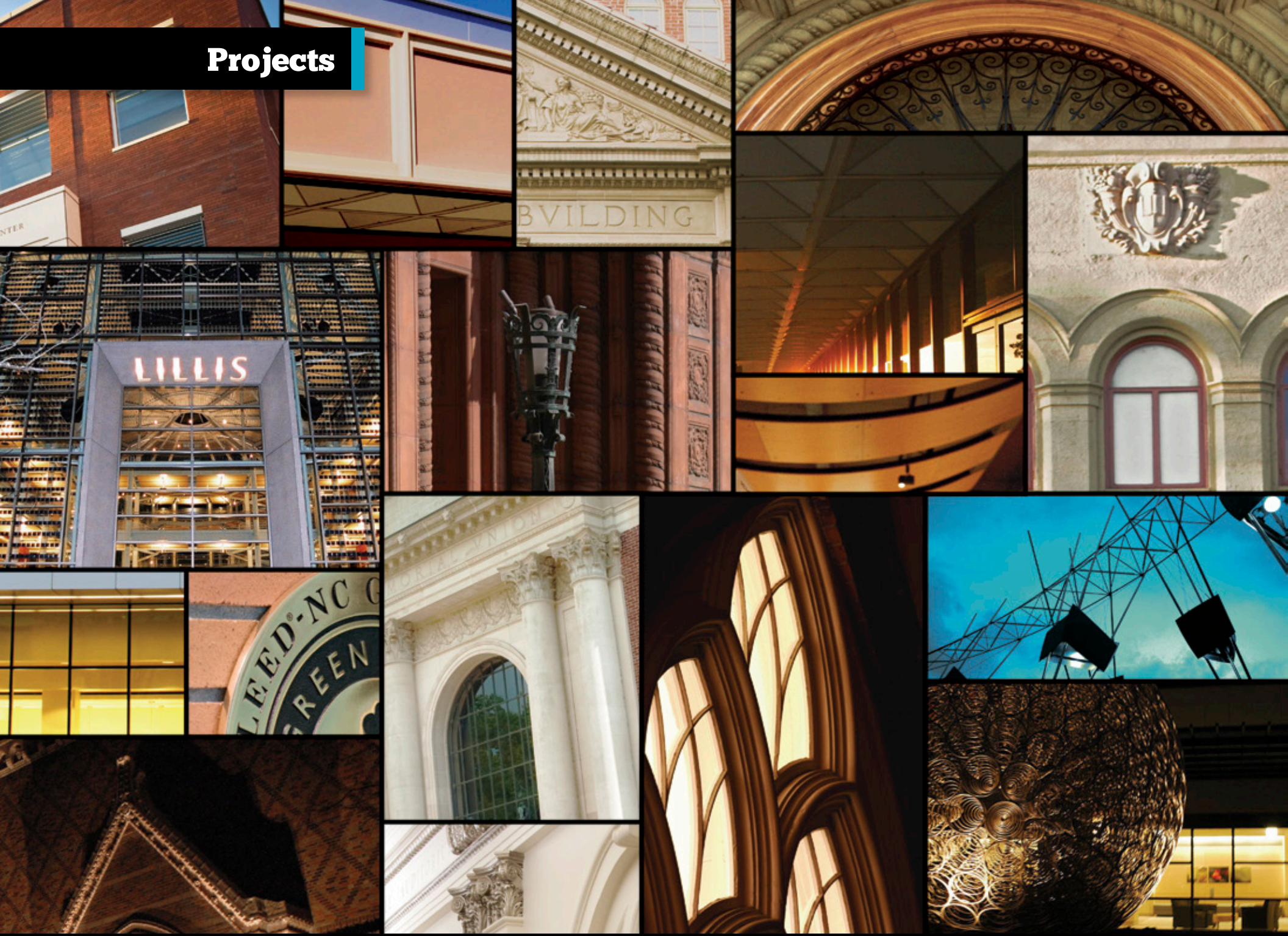
WOU is faced with the challenge of serving rapidly growing enrollment within aged facilities in need of seismic upgrades and with extensive deferred maintenance requirements. Many instructional buildings were built in the 1960s, designed with small classrooms which limit class size flexibility, and are in need of current technology upgrades.

Furthermore, there are a number of facilities in need of extensive upgrades to major electrical, plumbing, and HVAC systems. Addressing these challenges, in many cases, requires relocating the occupants of entire buildings.

Given that enrollment growth has been at an all-time high, existing space is insufficient to accommodate a move of this type without significant interruption to the education of our students. Providing new and additional academic space will relieve pressure on existing classrooms and clear a path to resolving many of WOU's facilities challenges.

*Source: OUS 2012
[1] Includes Sponsored Research, Teaching/Training Grants, Student Services Grants, Library Grants, and Similar Support (2011-12)
[2] E&G Only

Projects



2013-15 Governor's Balanced Budget (GBB) Capital Projects

State-Funded Projects (E&G)

OUS Ranking	OUS/GBB Ranking*	Campus	Project Name	Class	Type	Project Total	State-Supported Debt Funding	Campus-Supported Debt Funding	Other Funding**
1	1	PSU	School of Business Administration - Addition/Renovation	E&G	Add/Reno/DM	$50,000,000	$40,000,000	$0	$10,000,000
2	2	UO	Straub Hall and Earl Halls Classroom Expansion	E&G	Add/Reno	$22,000,000	$11,000,000	$0	$11,000,000
3	3	SYS	Capital Renewal Code and Safety	SYS	DM	$30,000,000	$30,000,000	$0	$0
5	4	OSU	Chemical, Biological, and Environmental Engineering Building	E&G	New	$40,000,000	$20,000,000	$0	$20,000,000
7	5	OSU	Classroom Building and Quad	E&G	New	$65,000,000	$32,500,000	$32,500,000	$0
7	5	WOU	New College of Education Facility	E&G	New	$18,600,000	$17,200,000	$0	$1,400,000
9	7	OSU	Cascade Campus Expansion	E&G	Acq/Reno	$24,000,000	$16,000,000	$4,000,000	$4,000,000
4	8	SOU	Theatre Arts Building Expansion and Remodel	E&G	Addition	$5,500,000	$5,500,000	$0	$0
Subtotal: Projects with State Funding						$255,100,000	$172,200,000	$36,500,000	$46,400,000

Campus-Funded Projects

OUS Ranking	OUS/GBB Ranking*	Campus	Project Name	Class	Type	Project Total	State-Supported Debt Funding	Campus-Supported Debt Funding	Other Funding**
1	1	OUS	Miscellaneous Student Building Fee Projects	SYS	All	$20,000,000	$0	$20,000,000	$0
2	2	OUS	Commercial Paper (Short Term Financing Pre-bonding)	SYS	All	$15,000,000	$0	$15,000,000	$0
3	3	OUS	Financing Agreements	SYS	All	$20,000,000	$0	$20,000,000	$0
4	4	OIT	InFocus Acquisition	E&G	Acq/Reno	$10,000,000	$0	$10,000,000	$0
5	5	OSU	Modular Data Center Facilities	E&G	New	$7,000,000	$0	$7,000,000	$0
6	6	OSU	Underground Communications Infrastructure	E&G	New	$10,000,000	$0	$10,000,000	$0
7	7	OSU	Real Estate Acquisitions	E&G	Acq	$5,880,000	$0	$5,880,000	$0
8	8	OSU	Housing and Dining Upgrades	AUX	Reno	$9,500,000	$0	$9,500,000	$0
9	9	PSU	Land Acquisition	AUX	Acq	$10,000,000	$0	$10,000,000	$0
10	10	SOU	Student Recreation Center	SBF	New	$20,000,000	$0	$20,000,000	$0
11	11	SOU	Cascades Hall Replacement	AUX	New	$7,000,000	$0	$7,000,000	$0
12	12	UO	Student Recreation Center Expansion and Renovation	SBF	Add/Reno	$50,250,000	$0	$50,250,000	$0
13	13	UO	University Housing Expansion	AUX	New	$84,750,000	$0	$84,750,000	$0
14	14	UO	Erb Memorial Student Union Expansion and Renovation	SBF	Add/Reno	$84,300,000	$0	$84,300,000	$0
Subtotal: Projects without State Funding						$353,680,000	$0	$353,680,000	$0
Total Request						$608,780,000	$172,200,000	$390,180,000	$46,400,000

*OUS Revised Priority Ranking, as of January 9, 2013

**"Other Funding" refers to General Funds, Lottery Bond proceeds, gift funds or other funds available to the university for that purpose

- AUX — Auxiliary
- E&G — Education and General
- DM — Deferred Maintenance
- F — Article XI-F Bonds (Campus-Paid)
- G — Article XI-G Bonds (General Fund)
- O — Other Funding (Gifts, Grants)
- Q — Article XI-Q Bonds
- R — Campus Revenue Bonds
- SBF — Student Building Fee
- SYS — System

Projects (GBB)

RANK 1

State-Funded

PSU: School of Business Administration - Addition/Renovation Project

This project will modernize functionally obsolete space, address deferred maintenance needs and expand capacity to address the teaching, research and service missions of one of PSU's most highly ranked programs. Today, 2800 separately admitted undergraduate and 600 graduate students are squeezed into outmoded space designed for half of the current enrollment. This project includes a 105,990 GSF renovation and modernization addressing the seismic and deferred maintenance needs of building, and an approximate 42,363 GSF addition to accommodate a 20%-30% enrollment increase. The 400 additional seats in 27 classrooms, 17 computer labs, and student team collaboration rooms support the State's 40-40-20 goals. The building will also house new research and business incubation centers connecting students to the region's business and non-profit partners, a hallmark of the school's curriculum aligning with the State's economic development goals to produce a highly qualified business workforce.

$50,000,000

- E&G
- DM
- G: $10M
- Q: $30M
- O: $10M


PSU: School of Business Administration (Proposed)

RANK 2

State-Funded

UO: Straub and Earl Halls Classroom Expansion Project

This project is the second phase of an earlier deferred maintenance project, and will add approximately 1,000 new classroom seats dedicated to general university use, including a highly needed 500+ seat lecture hall. The project consists of a two-story expansion and redevelopment of existing portions of Earl and Straub Halls and related site work. Redevelopment will result in 20,500 GSF of new space and will replace or remodel 29,600 GSF of existing space. By increasing the number of classroom seats, more class sections can be offered, which contributes to a shorter time to degree, and allows more classes to be offered during the most sought after teaching and learning times. These spaces will also be configured to take advantage of the latest best practices in teaching, including room configuration and technology infusion. Also, Straub Hall is currently undergoing a significant remodel aimed at relieving its overwhelming deferred maintenance issues which this project will address by replacing existing classrooms with new ones.

$22,000,000

- E&G
- G: $11M
- O: $11M


UO: Straub and Earl Halls (Existing)

RANK 3

State-Funded

OUS: Capital Renewal, Code and Safety

This funding source provides for an omnibus system-wide category to address current capital repairs, code compliance, ADA, and safety related projects. The $30 million of state funding will contribute to the $137 million per biennium that is needed to keep the backlog of deferred maintenance projects from growing above the current $600 million for E&G space. Based on a 2012 deferred maintenance inventory analysis, OUS will need to invest approximately $67 million annually to keep the backlog from growing.

$30,000,000

- E&G
- DM
- Q: $30M

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- R — Campus Revenue Bonds
- SBF — Student Building Fee
- SYS — System

Projects (GBB)

RANK 4

State-Funded

OSU: Chemical, Biological, and Environmental Engineering Building Project

The proposed 60,000 GSF building is initially intended to house the CBEE department, which is currently spread throughout 4 buildings on campus. The new building will provide research and instructional laboratories, faculty, graduate student and staff offices and departmental classrooms for the ABET-accredited programs, and a 100-200 seat general purpose classroom. This is the first of a two-phase building project for the department, as some of the faculty and their teaching spaces will not be immediately accommodated in the proposed building. There is no space available on campus to allow for the growth of CBEE, making the department inefficient. OSU enrollment has increased from 16,000 students to 25,000 over the last 10 years. The enrollment in the CBEE program has doubled in the last 5 years, from 395 to 804 students. The College expects to turn away as many as 40 qualified professional school candidates because of lack of space.

$40,000,000

- E&G
- G: $20M
- O: $20M

RANK 5

State-Funded

OSU: Classroom Building and Quad Project

Development of a classroom building and adjacent quad will accommodate significant enrollment growth that has occurred over the past decade and is projected to continue into the next decade to meet the state's 40-40-20 goal. OSU enrollment has increased from 16,000 students to 25,000 over the last 10 years. It is expected to increase to 30,000 students by 2025. This project will construct a new 4-story, 130,000 SF building to house general purpose classrooms (up to 2,500 seats) supporting all academic programs. The University Honors College will also be housed in the building. The structure will include approximately 14 general purpose classrooms varying in size from 40 to 600 seats. The Honors College will utilize approximately 9,000 SF of space in the building. Other proposed tenants include the Institutional Instructional Resource Center (IIRC) and Center for Teaching and Learning. The project includes development of a new, major 200,000 SF outdoor courtyard learning and study space.

$65,000,000

- E&G
- G: $32.5M
- R: $32.5M

RANK 5

State-Funded

WOU: New College of Education Project

The project, submitted in support of the ***Governor's Executive Order No. 12-16 to advance the innovative use of Oregon wood products,*** consists of a new 57,000 SF, 3-story building to house the College of Education, including classrooms and offices. It replaces an unreinforced masonry building in need of total renovation. The current structure is a 35,000 SF, 2-story wood frame building built in 1967. This 45-year-old building has small classrooms that limit class size flexibility and the ability to meet the needs of growing enrollment. The project vacates the existing structure, allowing full building deferred maintenance and modernization to be addressed in a future project. This project is WOU's top capital priority from the 2011 Campus Master Plan. It provides new instruction space capacity to address growing enrollment in programs that represent approximately 35% of WOU majors and directly supports the 40-40-20 goal as well as PK-20 goals identified by the Governor. Completion of this building provides additional instruction space, which is key to completing two subsequent deferred maintenance projects.

$18,600,000

- E&G
- G: $1.4M
- Q: $15.8M
- O: $1.4M

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- E&G — Education and General
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- R — Campus Revenue Bonds
- SBF — Student Building Fee
- SYS — System

Projects (GBB)

RANK 7

State-Funded

OSU: Cascade Campus Expansion Project

This project is intended for the acquisition and upgrades of adjacent real estate with associated parking and property to provide classroom, faculty offices and student services expansion capacity for OSU-Cascades campus. OSU-Cascades currently shares the Central Oregon Community College (COCC) campus. There is no additional space for OSU-Cascades to grow at the COCC location. OSU projects a growth rate of 15% per year for the Cascades Campus, doubling its size in the next 5 years. The acquisition will provide additional classroom space to allow the campus to relocate its current facilities (consisting of 1 building leased from COCC) off the COCC campus, creating a self-contained, complete campus. The buildings would house all the OSU-Cascades programs and departments, classrooms, laboratories, research space, faculty and staff offices and student services. Purchasing and renovating the buildings would be less costly than constructing new facilities for the same purpose.

$24,000,000

- E&G
- G: $4M
- Q: $12M
- F: $4M
- O: $4M

OSU: Cascades, Cascades Hall (Existing)

RANK 8

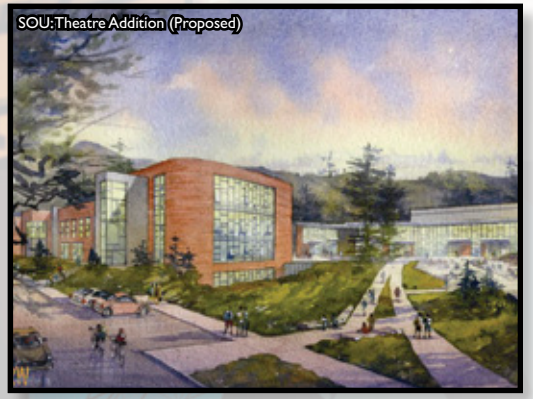
State-Funded

SOU: Theatre Arts Building Expansion and Remodel Project

This addition will relieve overcrowding in the theatre facility and permit further increases in enrollment in the Theatre Arts Department. Through the expansion of the physical environment and the introduction of a new emphasis in Musical Theatre, there is the potential for 20% growth in undergraduate enrollment in Theatre Arts. In addition, there is the opportunity for 10% growth in the Master of Theatre Studies in Production and Design. The project will construct new space and remodel existing space to accommodate over 150 new students specifically for theatre and musical theatre education and productions. The project was approved for $5.5 million in XI-G bonds in the 2009-2011 biennium. This request will substitute the previous approval for $11 million in XI-Q bonds. The project will add approximately 22,151 SF of new space and 10,488 remodeled GSF in 4-stories to accommodate faculty offices and classroom space, including upgrades to the costume and property shop.

$5,500,000

- E&G
- G: -$5.5
- Q: $11M


SOU: Theatre Addition (Proposed)

1

Campus-Funded

OUS: Miscellaneous Student Building Fee Projects

This funding source, available system-wide, provides bond limitation for planning, code, acquisitions, additions, remodels, or any student-driven projects eligible for Other Funds and/or Article XI-F(1) bonds to be repaid via the Student Building Fee. Projects are recommended by each campus' student government based on available bonding capacity. Previous examples include:

- Hoke Union Building (EOU)
- Student Recreation Center Turf (WOU)
- Helen Gordon Child Care Center Rehabilitation (PSU)
- College Union Addition (Oregon Tech)

$20,000,000

- SBF
- F: $20M

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- SYS — System

Projects (GBB)

2 Campus-Funded

OUS: Commercial Paper (Short-Term Financing)

This funding source, available system-wide, provides short-term financing for capital projects either as traditional commercial paper or other short-term funding mechanism available in the financial markets. Since OUS tends to only sell bonds once a year, this financing mechanism allows for timely project start and completion which lowers the escalation risk to project budgets. When used, short-term financing has the added benefit of reducing interest costs during the construction period. Short-term debt would typically be repaid with XI-F(1) proceeds raised when long-term permanent financing is placed but may also be repaid with other funds.

$15,000,000

- E&G
- F: $15M

3 Campus-Funded

OUS: Financing Agreements

This funding source, available system-wide, provides system-wide capacity to enter into a lease or other arrangement that contractually results in an ownership interest in land, improvements to land, structures, fixtures, or personal property. As a result of SB242, the allotment to DAS does not cover OUS' needs.

$20,000,000

- E&G
- Q: $20M

4 Campus-Funded

Oregon Tech: In-Focus Acquisition Project

The project will purchase the In-Focus building (located in Wilsonville) and may include tenant improvements. The project will help Oregon Tech meet the growing current and future student demand in Oregon for technology, allied health professionals, and renewable energy programs. The In-Focus building has four floors consisting of 131,851 GSF. Floors one, two, and four have been renovated for Oregon Tech educational purposes. Floor three (34,180 GSF) is subleased out for a minimum of five years with options for additional five years and was not involved in the renovation. The project was constructed to LEED Silver Level Certification. The three renovated floors consist of 43 classrooms and laboratories, offices, conference/meeting rooms, a library and tutoring labs. Oregon Tech has consolidated its four Portland-metro based instructional facilities into the single Wilsonville location. The request is for XI-F(1) bonds to match XI-G bonds in lieu of proceeds from the sale of its Harmony campus.

$10,000,000

- E&G
- F: $10M

Projects (GBB)

5 Campus-Funded

OSU: Modular Data Center Facilities Project

Campus data centers are complex facilities that house the numerous servers behind IT infrastructure. This project is intended to disperse data centers throughout the OSU campus to provide additional capacity for campus research, instructional and administrative activities. Most campus data centers are out of space, power or cooling capacity. As a result, offices and other spaces that could be used more productively for instructional and research purposes are being used for computer equipment. The proposed facilities would ensure that limited data center space does not limit the campus' ability to support new, large-scale, computational research projects, impairing the University's ability to recruit faculty and pursue research grants. Multiple, small, 500-1,000 SF buildings or spaces within existing buildings will be built to house equipment supporting data intensive activities. Included in the project scope are associated site and campus improvements.

$7,000,000

- E&G
- Q: $7M

6 Campus-Funded

OSU: Underground Communications Infrastructure Project

This project will expand the University's communications cable, copper, and fiber-optics pathways and electronics needed to ensure adequate availability and capacity for internet connectivity and other communications as OSU continues to grow. The project includes extending the underground conduit in 35th Street between Campus Way and Western Blvd., and in Washington Way east of 35th. This would provide the additional backbone needed to serve new construction and key facilities so that network service can be provided in a fault tolerant manner. New equipment will provide a 10-fold increase in data transfer capabilities necessary to support programs. The project supports the need to provide higher speed data and resilient communications capabilities to key computational and communications facilities. Included in the project scope are associated site and campus improvements.

$10,000,000

- E&G
- Q: $10M

7 Campus-Funded

OSU: Real Estate Acquisitions

OSU is in the process of hiring 80 new faculty members to support its academic and research efforts. Space for staff offices and research should be located in the core of campus or immediately adjacent to it so that students have access to faculty to improve their academic success. Relocating units and storage to effective off-campus locations opens opportunities on campus for the more appropriate academic and active research uses. This project is intended to build approximately 107,000 SF of warehouse, office and research support spaces to allow OSU to move scientific data/specimens/equipment that must be preserved for years from the core of campus, freeing space for day-to-day academic and research uses. The new space will also be used by administrative units that can effectively serve campus customers without being located on campus, again freeing space to be used for the highest and best uses: instructional, research and student services.

$5,880,000

- E&G
- R: $5.88M

Projects (GBB)

8 Campus-Funded

OSU: University Housing and Dining Upgrades Project

$9,500,000

- AUX
- F: $9.5M

Improvements in this project are intended to include exterior repairs, new windows, installation of fire sprinklers, upgrades to fire detection systems or combinations thereof, and will result in reduced energy consumptions and preserve life and property. The buildings targeted for upgrades include Callahan, Bloss, Poling, Cauthorn and Wilson. The five residence halls targeted for the upgrades range in height from 4 to 7 stories and house between 250 and 350 students each. Included in the project scope are associated site and campus improvements such as sidewalk upgrades, street improvements, utility and underground infrastructure upgrades and/or expansion and relocation or development of parking within the campus boundary. These improvements are part of an on-going capital program overseen by University Housing and Dining Services to keep existing facilities safe, efficient and cost effective for students.

9 Campus-Funded

PSU: Land Acquisition

$10,000,000

- AUX
- F: $10M

The project is initially intended for the purchase of .98 acres of land which is currently leased, and on which the PSU-owned University Center Building sits. The purchase of the land allows for long-term use of the block by PSU and saves the university money starting in the first year after the land is acquired. The current lease expires in 2023, and the lease rate is scheduled to increase from $748,230/year to $1,724,820/year in 2018. The current favorable real estate market, the high land lease payments currently paid by PSU and the steep anticipated escalation in payments in 2017 make this project a prudent investment for the university at this time. Debt service on the land, if owned by PSU, is anticipated to be less than the current lease rate until 2018 and significantly less beginning in 2018. The full block of land is located in the center of campus and fully developed with the 4-story University Center Building owned by PSU.

10 Campus-Funded

SOU: Student Recreation and Fitness Center Project

$20,000,000

- SBF
- F: $20M

SOU does not have adequate student recreation and fitness facilities. Current facilities are located on the far edge of campus underneath the football stands. A small climbing wall exists in a racquetball court, and a local YMCA located over 1 mile away from campus is only recreational facility available for students. Recreational and fitness facilities have become important for attracting and retaining students, are tied into some instructional areas, and are critical to supporting healthy lifestyles for those living on or near campus. Students approved a $95 fee in a Spring 2012 referendum. This project is initially intended to construct a new fitness center on the northeast corner of campus near student housing, dining and athletic facilities (McNeal Hall). The project will construct new gymnasiums, fitness rooms, activity rooms, weight rooms, outdoor programs and a climbing wall. The 2-story, 52,000 SF concrete and steel facility will also include small locker rooms, multi-purpose courts, and an artificial turf field.

Projects (GBB)

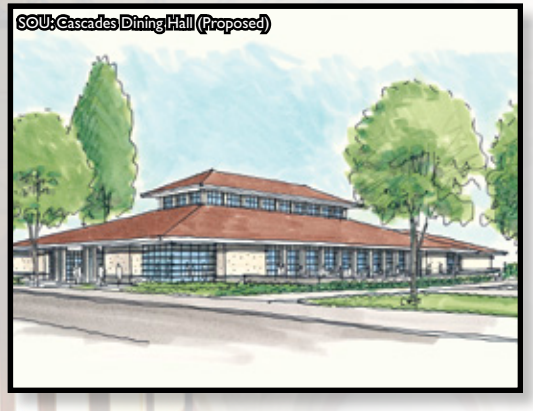
11 Campus-Funded

SOU: Cascades Dining Hall Replacement Project

The project will replace the current dining complex located at Cascades Hall to better serve students, and provide an additional meeting area and venue for campus events. The facility will consist of a new dining hall, kitchen, offices and multi-use areas for dining and meetings. A small convenience store will also be located in this facility to provide increased access for student housing located adjacent to the new dining hall site. The 27,617 GSF wood and steel building will provide food services to students living in on-campus housing as well as off-campus students, approximately 10,000 conference guests currently eat meals at the existing Cascades Dining Hall, in addition to over 1,000 residents and about 200 staff/faculty that eat on campus. The replaced facility will serve approximately 11,000 to 12,000 people over the year. This project is a high campus priority, as the existing dining hall will be demolished with the construction of the North Campus Housing Village Wood project.

$7,000,000

- AUX
- F: $7M


SOU: Cascades Dining Hall (Proposed)

12 Campus-Funded

UO: Student Recreation Center Expansion and Renovation Project

Student recreation facilities play a critical role in the recruitment and retention of students. Practicing healthy life habits including exercise, eating well, understanding body image issues, and stress reduction contribute to student success. This project, located in the Athletics and Recreation core of the UO campus, will create a state of the art facility that fully meets the student recreation needs and academic course curriculum that generates over 15,000 credits annually. The project consists of a 118,220 GSF, 2-to-3 story addition, and 24,000 GSF renovation of the Student Recreation Center and related site work, including parking replacement. The expanded and renovated facility will house a sixteen lap swim lane pool, diving tank, recreational pool and therapeutic facilities. Cardio and strength spaces will double, and a three-court gymnasium will be added. Mechanical, electrical and plumbing systems, and fire life and safety systems will also be upgraded. UO student body voted to approve a $38 additional SBF fee in a Spring 2012 referendum.

$50,250,000

- SBF
- F: $50.25M


UO - Student Recreation Center (Proposed)

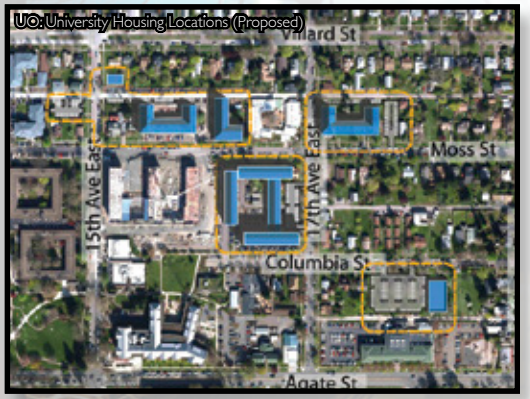
13 Campus-Funded

UO: University Housing Expansion Project

This project will create new on-campus residence hall rooms and new on-campus apartment rooms that will accommodate approximately 800 additional students in on-campus housing. The project builds capacity into the system (both in finances and in room counts) to allow for the systematic remodeling of several existing residence halls, which have reached the age of needing serious building system overhauls. The project will consist of 250,867 GSF of new construction in four separate buildings in east campus and related site work, including existing facilities and parking replacement. One building is a 4-to-5-story, 500 bed residence hall. The other three are 2-to-3 story apartment style living units and will contain 300 beds in total. By increasing capacity to successfully house and serve students in the campus core and thoughtfully renovating and constructing the buildings and spaces that enhance the student experience, it will ensure that students thrive in the university environment.

$84,750,000

- AUX
- F: $84.75M



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Projects (GBB)

14

Campus-Funded

UO: Erb Memorial Student Union Project

The Erb Memorial Union (EMU) serves as the university center and hearth for the campus. The EMU student organization and activity spaces, EMU programs, services for students, food and non-food retail operations, meeting rooms and conference facilities are in need of expansion and modernization. The project will substantially renovate and repair portions of the building, including the preservation of sections most historically and architecturally compelling. The project consists of an expansion and renovation that will update and provide space for student organizations and programs, student government and multicultural programs and will contain smart building technology and sustainable building design elements. UO student body voted to approve a $69 additional SBF fee in a Fall 2012 referendum.

$84,300,000

- SBF
- F: $83.4M

2013-15 OUS Prioritized Projects

Remaining 2013-2015 OUS Prioritized Projects (Not Included in GBB)

OUS Ranking	OUS/GBB Ranking*	Campus	Project Name	Class	Type	Project Total	State-Supported Debt Funding	Campus-Supported Debt Funding	Other Funding**
8	9	UO	Science Commons and Research Library Expansion/ Remodel	E&G	Add/Reno	$16,750,000	$8,375,000	$0	$8,375,000
6	10	OIT	Cornett Hall Renovation - Deferred Maintenance	E&G	DM/Renov	$2,000,000	$2,000,000	$0	$0
9	11	EOU	Eastern Learning Commons Planning/Design and Upgrades	E&G	New	$2,000,000	$2,000,000	$0	$0
4	12	PSU	Peter Stott Center Renovation and Expansion	E&G/AUX	Add/Reno/DM	$44,000,000	$22,000,000	$0	$22,000,000
3	13	SYS	Capital Renewal Code and Safety - Other E&G	E&G	DM	$10,000,000	$10,000,000	$0	$0
10	14	PSU	Neuberger Hall - Deferred Maintenance	E&G	DM	$42,500,000	$41,370,000	$980,000	$150,000
2	15	UO	Chapman Hall Renovation, Seismic Upgrade and DM	E&G	Renov/DM	$10,250,000	$7,375,000	$0	$2,875,000
11	16	UO	Huestis Hall 2nd Floor Renovation	E&G	Renov	$8,000,000	$4,000,000	$0	$4,000,000
12	17	UO	Global Studies Building	E&G	New	$18,250,000	$9,125,000	$0	$9,125,000
6	18	SYS	Research Collaboratory	E&G	New	$5,000,000	$5,000,000	$0	$0
13	19	SOU	McNeal Hall - Deferred Maintenance	E&G/SBF	DM	$15,875,000	$8,500,000	$7,375,000	$0
14	20	EOU	Inlow Deferred Maintenance - Phase 2	E&G	DM/Renov	$4,000,000	$3,737,000	$263,000	$0
15	21	PSU	City Tower Purchase and Renovation	E&G	Acq/Renov	$27,000,000	$13,500,000	$13,500,000	$0
Total Request of Remaining OUS Prioritized Projects						$205,625,000	$136,982,000	$22,118,000	$46,525,000

*OUS Revised Priority Ranking, as of January 9, 2013

**"Other Funding" refers to General Funds, Lottery Bond proceeds, gift funds or other funds available to the university for that purpose

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- SYS — System

Projects (Not in GBB)

RANK 9

State-Funded

UO: Science Library Expansion and Remodel Project

This project will completely remodel the existing underground science library and create a new Science Learning Commons that will support advanced research and problem solving in a variety of scientific disciplines. The project consists of a two-story renovation and addition to the underground Science Library and related site work, adding approximately 3,525 GSF of new space, as well as remodeling 36,525 GSF of the existing facility. Work includes reconfiguring the stacks and using compact shelving to generate additional space for technology and study, and reworking surrounding spaces that are overcrowded and poorly designed. Access to a research library adds significantly to student success and educational attainment. At the UO, the research library is highly valued by students, and between 10,000 and 11,000 people use the facilities during the academic term. The new facility will be a point of "scientific discovery" with OMSI-like programming, serving as a bridge to the K-12 community.

$16,750,000

- E&G
- G: $8.375M
- O: $8.375M


UO: Science Library (Example Existing Space)

RANK 10

State-Funded

Oregon Tech: Cornett Hall Renovation and Deferred Maintenance Project

This project provides planning for the comprehensive renovation or replacement of the 97,238 GSF single-story building to better accommodate current programs, and to correct required seismic structural code-related deficiencies. Cornett Hall, originally built in 1964, has several building systems currently in deferred maintenance, including mechanical and electrical systems, interior and exterior finishes, roof system, domestic water distribution, and the sanitary and storm sewer systems. The building also has serious accessibility problems primarily due to the finished floor elevation being 5' below the surrounding grade. The project will examine the feasibility of renovating Cornett Hall into a facility that better suits the long-term programmatic needs of OIT, and compare that with the cost of replacing the facility with a new building. The project will include additional building conditions analyses and an update to Oregon Tech's current Master Plan.

$2,000,000

- E&G
- Planning
- DM
- Q: $2M


OIT: Cornett Hall (Existing)

RANK 11

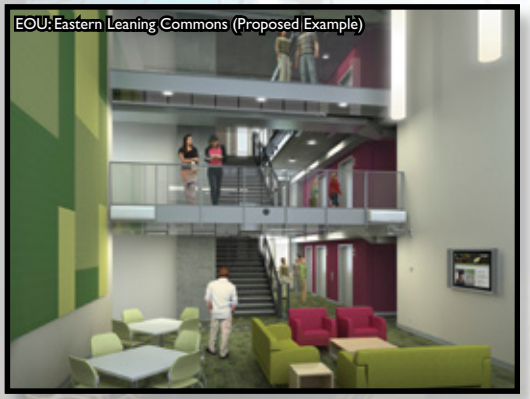
State-Funded

EOU: Eastern Learning Commons Planning/Design/Infrastructure Upgrades Project

The project consists of completing the planning, concept design, schematic design, and design development for the Eastern Learning Commons (ELC) Project. It also includes the purchase and installation of equipment for preliminary network infrastructure upgrades. The ELC will be a multi-use facility, creating a complete learning-centered environment. It will be designed to provide 3-4 live capture Distance Learning classrooms in a live-learn environment, and facilitate quick adaptation to emerging and evolving programs with a particular focus on technology-rich curricula such as EOU's growing Media Arts/Communication program. The technology hub will meet the University's needs to replace end-of-life infrastructure and provide a fault-tolerant, high capacity network and a unified home for all Information Technology services for the campus. By combining these elements with a residential facility, EOU will provide a connection for its on and off campus students, enriching student success overall.

$2,000,000

- E&G
- Planning
- Q: $2M


EOU: Eastern Leaning Commons (Proposed Example)

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Projects (Not in GBB)

RANK 12

State-Funded

PSU: Peter Stott Center Renovation and Expansion Project

The 221,935 GSF project will significantly modernize a key facility (74% E&G, 26% athletics) in the heart of campus, addressing fire, life safety and ADA issues as well as replacement or improvements to major building systems. A new arena would replace a rooftop tennis structure, and hold approximately 5,000 attendees for sporting events, performances and academic symposia. An additional 20,000 SF of reprogrammed and modernized space will be added to the building, with the ability to hold approximately 22 athletics sports rooms and practice courts, many of which will be used for credit bearing classes including the Community Health Program. This project has three primary goals: 1) construct additional classroom and study areas in the core of campus to meet space needs; 2) address a significant amount of the building's seismic and deferred maintenance needs; and, 3) create a campus gateway to the city's park blocks with expanded, modern athletic, event and academic space that will meet campus enrollment needs.

$44,000,000

- E&G/AUX
- DM
- G: $20M
- M: $2M
- O: $22M

PSU: Peter Stott Center (Viking Pavilion) (Proposed)

RANK 13

State-Funded

OUS: Capital Renewal, Code and Safety - Other E&G

This funding source provides for an omnibus system-wide category to address current capital repairs, code compliance, ADA, and safety related projects. The $10 million of state funding will contribute to the $137 million per biennium that is needed to keep the backlog of deferred maintenance projects from growing above the current $600 million for E&G space. Based on a 2012 deferred maintenance inventory analysis, OUS will need to invest approximately $67 million annually to keep the backlog from growing.

$10,000,000

- E&G
- DM
- Q: $10M

RANK 14

State-Funded

PSU: Neuberger Hall Deferred Maintenance Project

This renovation project will extend the useful life of PSU's most-intensively used classroom facility, and improve the learning and working environments of students and faculty. Addressing the most critical issues within the building will mitigate the risk of a major systems failure which could lead to a loss of essential classrooms. The project will provide major seismic and deferred maintenance renovations that include a replacement of all major building systems and a modernization of the facility. The renovated 237,874 GSF building will restore approximately 40 classrooms, 20 class computer labs, offices and other support spaces. The project endeavors to do as much deferred maintenance in this phase as possible to complete the project in a single phase, however this does not preclude future work. The building will be abated and seismically reinforced, exterior envelope deficiencies will be addressed, HVAC and electrical systems will be upgraded, the elevator will be modernized, and fire prevention and ADA accessibility issues will be addressed.

$42,500,000

- E&G
- DM
- G: $12.05M
- L: $20.55M
- M: $8.5M
- S: $1.25M
- O: $.150M


PSU: Neuberger Hall (Proposed)

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Projects (Not in GBB)

RANK 15

State-Funded

UO: Chapman Hall Renovation, Seismic Upgrade and Deferred Maintenance Project

$10,250,000

This deferred maintenance and seismic renovation project will consist of a 23,050 GSF interior and exterior renovation of Chapman Hall, home of the Robert D. Clark Honors College. A significant reorganization of Chapman Hall is necessary to satisfy long-term program needs. The renovated building will accommodate 75 -100 additional students, with classrooms, seminar rooms, a conference room, thesis defense room, library, departmental faculty and administrative space and Honors College student spaces. This project will help the university attract and retain high achieving students from Oregon, thereby making a major contribution to Oregon's 40-40-20 Plan, and keeping some of the best and brightest students here in the state. Seismic and deferred maintenance includes building exterior, windows and doors; elevators HVAC equipment, controls and distribution; electrical equipment; plumbing rough-in; plumbing fixtures; fire protection; built-in equipment and specialties; interior finishes; and painting.

- E&G
- DM
- G: $3.69M
- L: $3.69M
- O: $2.88M


UO: Chapman Hall (Existing)

RANK 16

State-Funded

UO: Huestis Hall 2nd Floor Renovation Project

$8,000,000

This renovation project, located within the Lokey Science Complex, will create a BIOCOR facility for cutting edge training in life science technology and application. The facility will significantly increase capacity for graduate education and research in the life sciences, provide industry access to cutting edge tools and expertise, and enhance the quality of Oregon research. Currently, the Huestis Hall second floor laboratories are substantially unchanged since being built in 1973. This project will repair dilapidated systems (structure, plumbing, HVAC), bring this area up to current seismic and laboratory safety standards, and conserve energy. With this renovation, an additional 1,050 student credit hours will be generated. The project will add 720 undergraduate student credit hours over the biennium due to an increased number of undergraduate researchers working in BIOCOR with their faculty mentors. It will also add 330 graduate student credit hours due to an increase the number of graduate researchers.

- E&G
- G: $4M
- O: $4M


UO: Heustis Hall (Existing)

RANK 17

State-Funded

UO: Global Studies Building

$18,250,000

The Global Studies Building project, located in the academic core of campus, will add a new campus building to house the College of Arts and Sciences academic departments and programs within the Oregon Consortium of International and Area Studies and International Affairs units and centers, as well as a 400+ seat new general university use classroom with break-out spaces. The project will consist of a new three-to-four story, 37,000 GSF building and related site work. The building will house general university classrooms, breakout rooms, seminar and conference rooms, offices, and faculty and staff support areas for the academic programs and centers it houses. This project will enable UO to better serve students studying world cultures, the global economy and international affairs. A Global Studies Center will more fully integrate grant funded programming, research and outreach with global education opportunities for students.

- E&G
- G: $9.13M
- O: $9.13M

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Projects (Not in GBB)

RANK 18

State-Funded

OUS: Research Collaboratory Project

This project is intended for the development of collaboratory technology capabilities. New, more advanced cyber infrastructure is needed to allow full duplex, real-time interactive engagement among all OUS researchers and participation stakeholders, which will enable Oregon to be more competitive for innovation and jobs. The project includes facilities and IT infrastructure for dedicated telepresence, computing and visualization capabilities (e.g., state of the art videoconferencing facilities, cloud computing, and high tech video display/information integration); software engineering (invention of next-generation decision support models and algorithms); and dedicated space for professional support technicians required for operations, maintain the infrastructure, and provide outreach training for campus and community users. The Research Collaboratory will be comprised of several small, yet-to-be-determined facilities that may be either renovations to existing structures, or newly constructed facilities on one or more campus location.

$5,000,000

- E&G
- Q: $5M

RANK 19

State-Funded

SOU: McNeal Hall Deferred Maintenance Project

McNeal Hall serves as the primary facility for campus athletics, health and sports-related administration. The building consists of gymnasiums, classrooms, locker rooms, faculty and administrative offices, a swimming pool and the north campus heating plant. The building has extensive deferred maintenance and seismic upgrades needed to ensure the facility's continued use. This project will remodel approximately 96,216 GSF of McNeal Hall, providing seismic, mechanical and shell upgrades to meet existing building safety codes. Significant improvement to the HVAC and exterior shell will result in energy savings as well as improved user comfort. The seismic and mechanical upgrades will require major repairs. The exterior concrete masonry unit walls have cracks and the entire facility is in poor and deteriorating condition. This project will also replace major HVAC units including a boiler that serves as a back-up to the campus heating system, and install seismic upgrades throughout the facility.

$15,875,000

- E&G/AUX
- G: $3.25M
- F: $6.5M
- L: $3.25M
- M: $2M
- S: $.875M

RANK 20

State-Funded

EOU: Inlow Hall Deferred Maintenance Project, Phase II

Phase I (first floor renovation) was completed in 2010; Phase II will complete the interior renovation, seismic upgrade and energy conservation measures for the second floor of Inlow Hall. The second floor provides administrative offices and support space for the departments of Academic Affairs, Finance & Administration, Human Resources, Office of the President, Student Affairs, Technology Resources and University Advancement. Construction will consist of seismic, architectural, mechanical and electrical renovations to 13,760 GSF on the second floor of the building. This project will help EOU meet the OUS goals of increasing and improving access, improving program quality, assuring long term financial sustainability, and meeting regional and community priorities by facilitating access for and retention of students. The project will improve essential administrative services facilities such as academic advising, financial aid, admissions and student/academic affairs, key to student success.

$4,000,000

- E&G
- G: $1.6M
- L: $1.6M
- M: $.4M
- S: $.4M

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Projects (Not in GBB)

RANK 21

State-Funded

PSU: City Tower Acquisition and Renovation Project

The purchase and renovation of the City Tower is a strategic acquisition for PSU, which already owns the land and the below grade floors in this building in a condominium. The above grade property is a seven story, 165,267 GSF, Class A office tower that has been owned and operated by the City of Portland. The building is located at the east end of campus on 4th Avenue and is adjacent to the PSU Maseeh School of Engineering and Computer Science and the Fourth Avenue Building. The property will provide much needed space for classrooms, student study areas, and faculty offices. Approximately 32,000 SF is currently anticipated to be leased to the City of Portland until needed by PSU. The building will allow the PSU to increase its capacity to accommodate enrollment growth. The combined acquisition and renovation costs are substantially less than developing a new building of equal size. Additionally, the location, quality, and layout of the building floor plates are ideal for PSU's academic and research uses.

$27,000,000

- E&G
- G: $13.5M
- R: $13.5M


PSU: City Tower (Existing)

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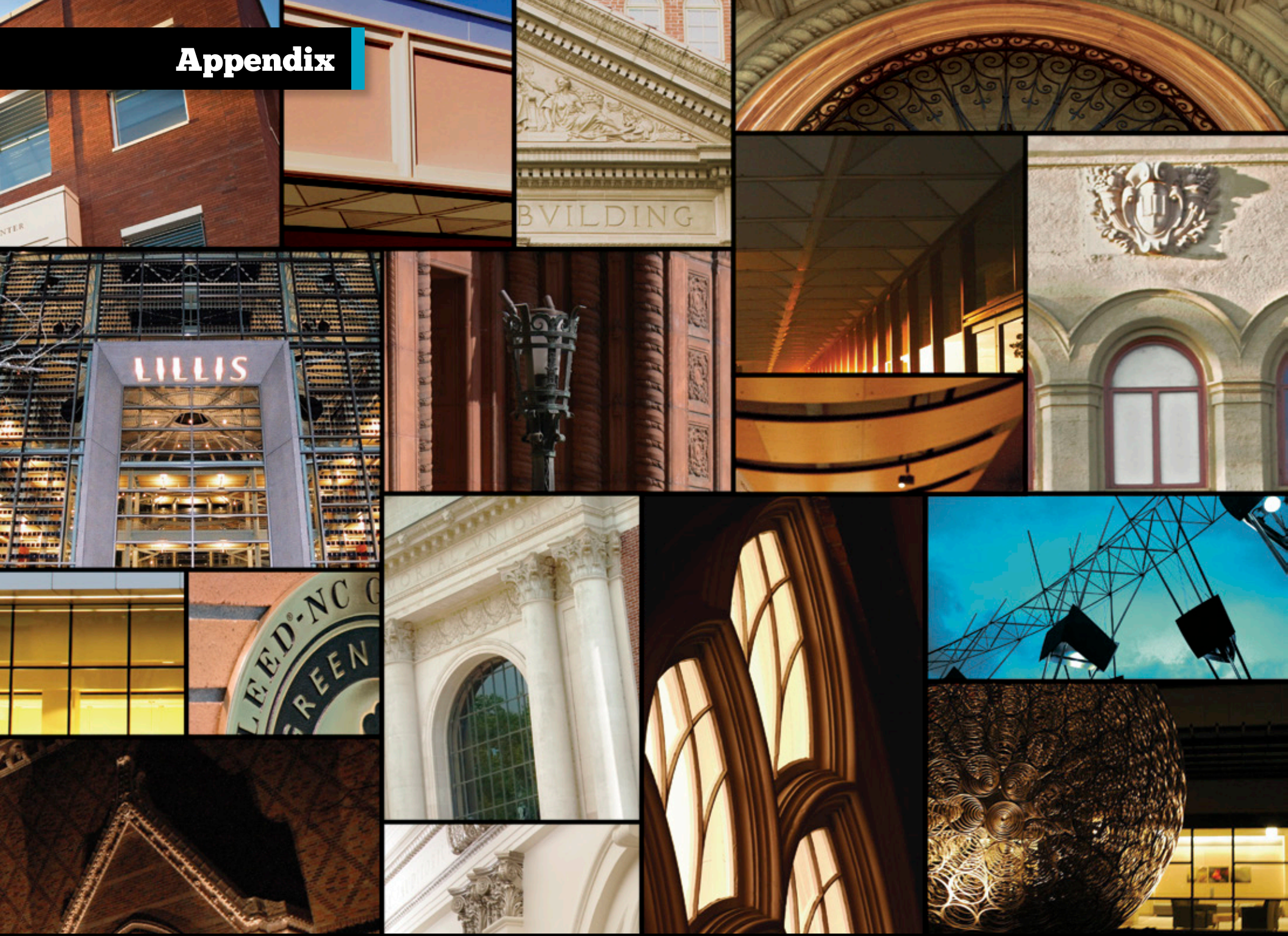
Appendix



Benchmarking and Performance Statistics

Capital Renewal*

Capital Renewal Snapshot for 2012 (E&G Only)

Campus	GSF	Calculated CRV (000's)	Backlog (000's)	Backlog $/GSF	Average Annual Renewal (000's)	Average Annual Infra (000's)	FCI	Renewal/CRV (%)
EOU	585,481	$182,254	$18,186	$31.06	$2,697	$1,042	0.10	1.48%
OIT	468,211	$132,413	$33,200	$70.91	$2,267	$611	0.27	1.712%
OSU	4,454,036	$1,553,097	$154,886	$34.77	$24,341	$1,420	0.10	1.567%
PSU	2,414,452	$766,038	$168,581	$69.82	$12,122	$1,236	0.22	1.582%
SOU	865,645	$238,753	$18,147	$20.96	$4,138	$428	0.08	1.733%
UO	3,483,674	$1,165,618	$105,107	$30.17	$18,949	$2,560	0.09	1.626%
WOU	695,132	$191,431	$29,619	$42.61	$3,285	$624	0.15	1.716%
Total	12,966,631	$4,229,603	$527,726	$42.38	$67,892	$7,922	13%	1.61%

Terminology

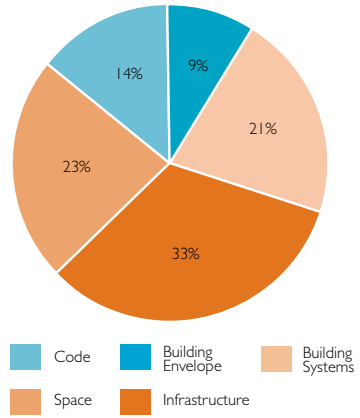
- **Calculated CRV (Current Replacement Value):** Calculated value for total building replacement (using the same construction and systems).
- **Deferred Maintenance (DM) Backlog:** Accumulated dollar amount of systems and/or subsystems components that have exceeded the end of their useful life.
- **Average Annual Renewal Needs:** Average amount of renewal investment dollars needed to maintain a target level of stewardship.
- **Average Annual Infrastructure Needs:** Average amount of investment needed to maintain the infrastructure between buildings.
- **FCI (Facilities Conditions Index):** Relative measure of overall building condition, it is derived by dividing the deferred maintenance backlog amount by the calculated CRV (expressed as a percentage). The higher the percentage, the lower the building condition.
- **Renewal/CRV:** Expression of the amount of average annual renewal as a relative percentage of the CRV.

DM Backlog (by Subsystem)

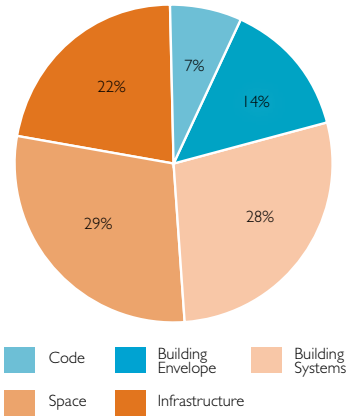
Subsystem	DM Backlog (000's)
a.1. Roofing	$6,800
b.1. Building Exteriors - Hard	$53,300
c.1. Elevators and Conveying Systems	$12,700
d.1. HVAC - Equipment	$45,900
d.2. HVAC Controls	$8,700
e.1. HVAC - Distribution Systems	$55,000
f.1. Electrical Equipment	$154,300
f.2. Lighting	$5,700
f.3. Power Wiring	$8,000
g.1. Plumbing Fixtures	$18,700
g.2. Plumbing Rough-In	$19,400
h.1. Fire Protection Systems	$18,100
i.1. Built-in Equipment and Specialties	$79,300
j.1. Interior Finishes: Walls, Floors, Doors	$39,100
k.1. Painting - Public Areas	$700
n.1. All Renewal - Small Basic	$1,900
Total	$528 Million

Capital Investment Mix

OUS Spending Mix
(Last 6 Years)



Peer Spending Mix
(Last 6 Years)

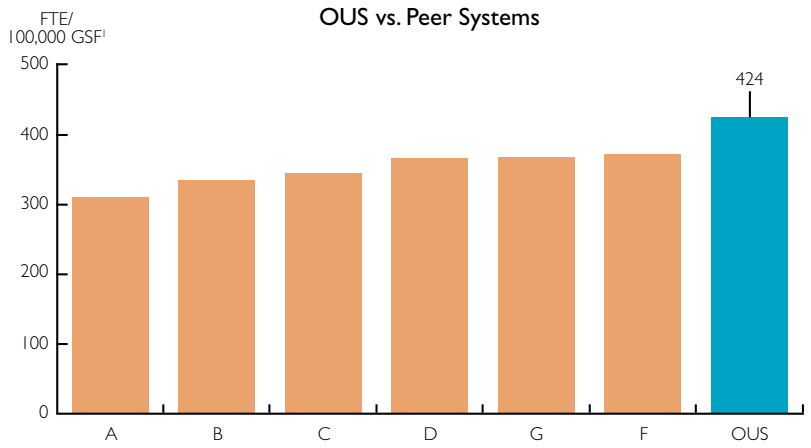


*Source: Sightlines, OUS 2012

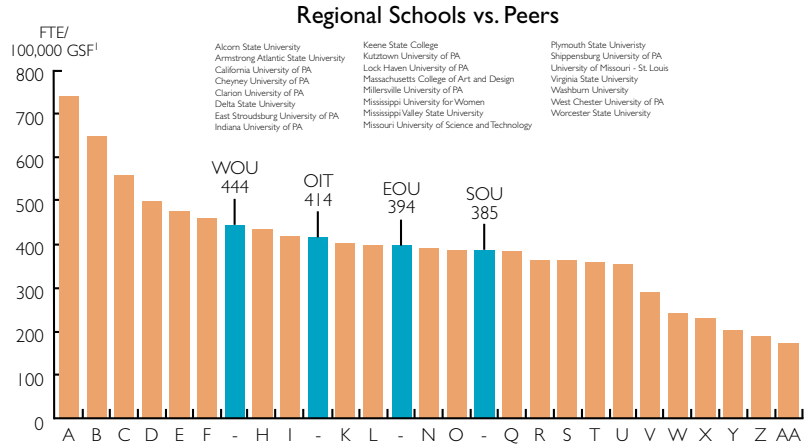
Benchmarking and Performance Statistics

Campus Density*

OUS Campus Density



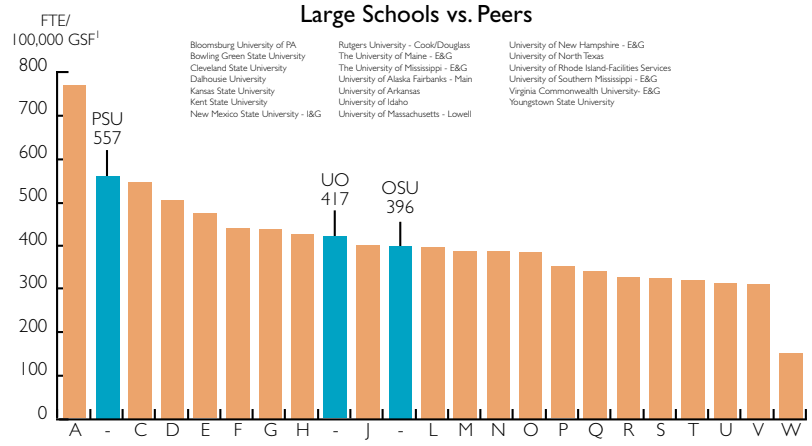
Regional School Campus Density



Density by Campus

Campus	Density Factor[1]
EOU	394
OIT	414
OSU	396
PSU	557
SOU	385
UO	417
WOU	444
OUS Average	424

Large School Campus Density



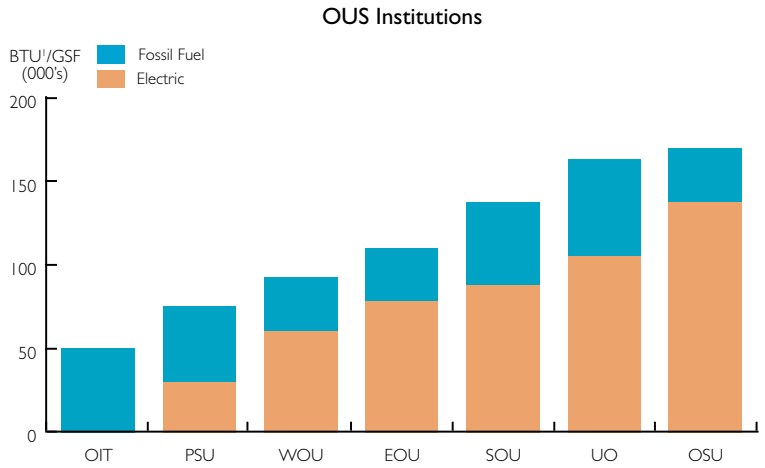
*Source: Sightlines, OUS 2012

[1] Density Factor: FTE (Full Time Equivalent)/100,000 GSF

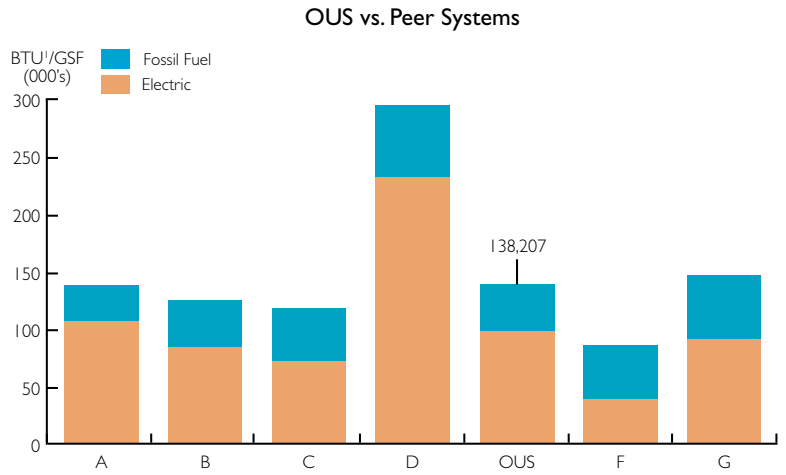
Benchmarking and Performance Statistics

Energy*

Campus Energy Consumption



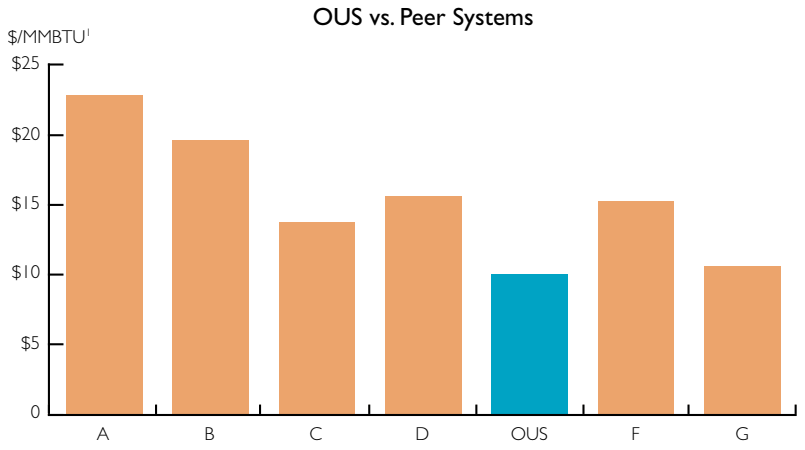
OUS Energy Consumption



Energy Consumption (Electric and Fossil[1])

Campus	Electric BTU*/GSF	Fossil BTU*/GSF	Total
EOU	78,613	32,074	110,687
OIT	183	50,967	51,150
OSU	138,295	31,812	170,107
PSU	30,474	45,469	75,942
SOU	88,854	49,441	138,294
UO	105,737	58,308	164,045
WOU	61,115	31,995	93,110
Total	503,269	300,065	803,334

OUS Energy Cost

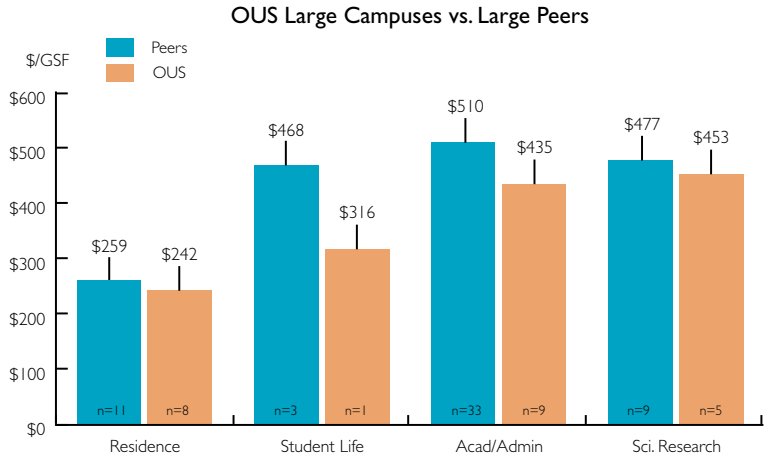


*Source: Sightlines, OUS 2012
[1] British Thermal Unit (BTU)/Million Metric British Thermal Unit

Financial Analysis

Average Total Project Cost Benchmarks*

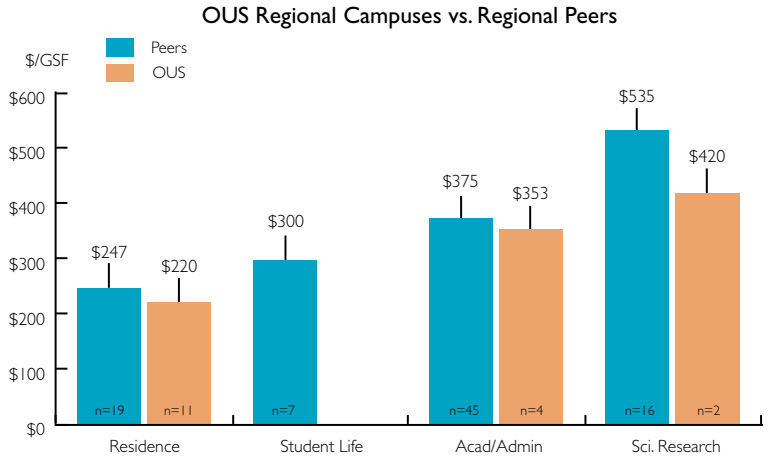
Large School Average Total Project Cost by Function



Large Peer Schools (Sample Size 56 Facilities)

Indiana University
Iowa State University
New Mexico State University
Penn State University
University of California - Davis
University of California - Irvine
University of Colorado - Boulder
University of Illinois - U/C
University of Minnesota

Regional School Average Total Project Cost by Function



Regional Peer Schools (Sample Size 87 Facilities)

Alcorn State University
Bowling Green State University
California University of PA
Cheyney University of PA
Clarion University of PA
Clemson University
Cleveland State University
Delta State University
East Stroudsburg University of PA
Edinboro University of PA
Framingham State University
George Mason University
Jackson State University
Kansas State University
Keene State College
Lock Haven University of PA
Mansfield University of PA
Massachusetts College of Art and Design
Millersville University of PA
Mississippi Valley State University
Missouri University of Science and Tech
Plymouth State Univeristy
Shippensburg University of PA
Slippery Rock University of PA
Temple University
The Richard Stockton College of New Jersey
University of Maine at Farmington
University of Rhode Island
University of Southern Mississippi
Virginia State University
Washburn University
West Virginia University
Westfield State University
Worcester State University

*Source: Sightlines, OUS 2012; Regionally-Adjusted Average Cost per Gross Square Foot; Project Costs Normalized to FY 2012, Representing Projects from FY 2005-2012

Financial Analysis

Component Lifespan Cost

Cost Comparison by Component Group – Commercial vs. University Construction

Component Group	Component Cost			Estimated Lifespan in Years		Delta	
	Good Commercial	University Construction	Cost Difference	Good Commercial	University Construction	Cost (% Diff)[1]	Life (% Diff)
HVAC							
Reheat Coils	$0.56 Copper	$0.26 E-Coated	($0.30)	40	40	52%	0%
Exhaust Duct	$6.50	$8.00	$1.50	25	40	23%	60%
Air-Handlers w/ Heat Recovery	$7/CFM	$8.50/CFM	$1.50/CFM	25	30	21%	20%
VAV vs. Chilled Beam	$25/SF (VAV)	$36/SF (Chilled)	$11/SF	20	40	44%	100%
Solar Thermal	$0	$200/SF Panels	$200/SF Panels	NA	NA	1.50%	NA
Roofing/Exterior Skin							
Roof Warranty	10 year	20 year	$.50/sf Materials	15	25	23.00%	200%
Flashings	Prefinished, $6	Stainless, $10	$4/LF	25	60-100	66%	>240%
Single Ply vs. Built-Up Roofing	$11/SF (TPO)	$13.50/SF(BUR)	$2.50/SF	20	30	23%	50%
Wood Siding vs. Brick	$8/SF(Hardiplank)	$21.00/SF(Brick)	$13/SF	20	75	263%	275%
Door Hardware							
Door Hardware	$850/Opening	$1200/Opening	$350	10	20	41%	100%
Door Handles/Locksets	Grade 2: $200	Grade 1: $300	$100	5	10-20	50%	>200%
Panic Hardware	Grade 2: $400	Grade 1: $800	$400	5	10-20	200%	>200%
Plumbing							
PEX vs. Copper Tubing	$10/LF	$25/LF	$15/LF	30	50	150%	66%
Lavatory Faucets	$262 (Installed)	$362	$100.00	8	20	39%	250%
Finishes							
Impact Resistant Board	$1.28/SF	$1.86/SF	$0.58/SF	10	20	45%	100%
Carpet vs. Honed Concrete	$3.50/SF	$7/SF	$3.50/SF	15	50	100%	233%
Elevators							
(3-Stop) Wall,Ceiling and Floor Finishes, Controllers	$60,000	$75,000	$15,000	10	20	25%	100%
Electrical							
Controls	$2.50/SF	$4.00 /SF	$1.50/SF	15	20	60%	33%
Lighting	$5/SF	$6.50 /SF	$1.50/SF	15	20	30%	33%
Telephone/Data & Security							
Data	$3.00/SF	$4.00/SF	$1.00/SF	30	30	33%	0%
General							
Prevailing Wages	25% of Hard Costs	27.5% of Hard Costs	2.50%	NA	NA	2.50%	NA
1% for Art	NA	1% Project Cost	100%	NA	NA	100%	NA

*Source: Skanska USA and Fortis Construction, 2012; Representative Sample

[1]Note: Actual cost differential may be exceeded when considering maintenance. Example: Commercial door hardware in a university application would require twice-monthly maintenance, compared to yearly maintenance with more durable hardware used in university construction

Financial Analysis

Campus Debt Burden

OUS manages its debt in accordance with a Debt Policy approved by the OSBHE. The policy outlines OUS' philosophy on debt, establishes a control framework for approving and managing debt, defines reporting guidelines, and establishes debt management guidelines. The policy also caps the OUS' annual debt obligations to 7 percent of adjusted operating expenses. The table below shows each campus's Debt Burden Ratio. The table incorporates all of OUS' planned capital construction projects, and corresponding debt, through fiscal year 2019.

Campus Debt Burden Ratio Calculation*

FY	EOU	OIT	OSU	PSU	SOU	UO	WOU
2010	5.40%	5.30%	3.40%	4.20%	3.40%	5.30%	4.00%
2011	5.00%	5.10%	3.70%	4.60%	3.30%	5.80%	4.70%
2012	4.80%	5.40%	3.40%	4.90%	3.10%	6.40%	5.10%
2013	4.70%	5.00%	3.30%	4.80%	3.30%	6.00%	5.10%
2014	5.60%	5.00%	3.20%	4.40%	3.70%	5.70%	5.00%
2015	5.20%	5.50%	4.00%	4.60%	5.00%	6.50%	4.80%
2016	5.50%	5.20%	4.20%	4.70%	5.00%	6.20%	4.60%
2017	5.00%	5.00%	4.00%	4.40%	4.60%	6.50%	5.80%
2018	4.80%	4.70%	3.80%	4.10%	4.20%	6.10%	6.80%
2019	3.90%	4.40%	3.70%	3.90%	3.80%	5.80%	6.40%

*Source: OUS, 2012

Access this and related documents electronically on the OUS website:

www.ous.edu

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Oregon University System

GROWING JOBS AND TRANSFORMING OREGON'S ECONOMY:

BACKGROUND DOCUMENTS

Monday, March 25, 2013

RESEARCH AND INNOVATION AT OREGON'S PUBLIC UNIVERSITIES

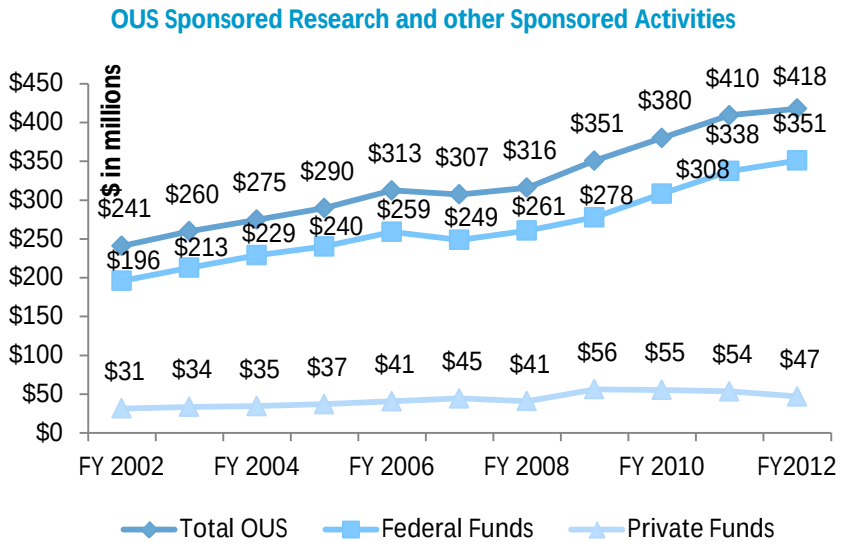
OUS's Mission of Economic Development and Knowledge Creation

Research and innovation are central to the overall Oregon University System (OUS) mission, providing direct economic and social benefits to Oregon, including new jobs, new solutions, and new industries. Research carried out by OUS faculty and students at all campuses informs the work of industry, healthcare, public agencies, natural resources, schools, and others, bringing the benefits of new concepts and best practices to those enterprises. Research and development is essential to effective teaching and learning, and is an integral part of the university's role in increasing educational attainment in the state. Focused inquiry and research, when incorporated into students' curriculum, build a deeper understanding of the subject and a curiosity for learning through observation and experimentation. Finally, a well supported university research enterprise attracts and retains a strong faculty which develops discoveries and innovations that often provide tangible economic returns to the university and state.

The Board of Higher Education recognizes that the research mission of Oregon's public universities is integral to teaching and student learning, and the innovations resulting from OUS's research work are a keystone for economic success for Oregon. The OUS Academic Strategies division monitors and reports research performance results annually to the Board, the Oregon Education Investment Board, campus communities, the Legislature, and the public. OUS research metrics include total grant and contract expenditures, expenditures per full-time faculty, inventions disclosed, licensing revenue generated, and start-up companies formed.

Research Funding and Rankings

Oregon's public university faculty members are among the most successful in the country at earning federal support for their research and discoveries. In fact, Oregon's public universities[i] are the 7th highest in the nation in federal research funding per faculty member. OUS total sponsored research and other sponsored activities' expenditures[ii] reached **a record high of $418 million in fiscal year (FY) 2012**, an increase of 74% since FY 2002.



Federal grants are competitively awarded and, as such, provide a testament to the expertise and entrepreneurship of OUS faculty. Nearly all OUS sponsored activities (97% in FY12) are funded by sources other than state dollars. Federal sources account for the largest percentage of total expenditures (84% in FY12), creating a substantial economic impact upon Oregon communities.

Examples: Economic and Social Impact of Research Activities

The impact of research extends far beyond that of the initial revenue and spending. Research yields innovations that create jobs and support a higher quality of life for all Oregonians. Research innovations improve and expand numerous Oregon industries, bring in licensing revenue, and lead to spin-off companies and industry expansions or advancements that benefit Oregonians across the state. Although the three largest campuses are designated "research universities," **faculty members and students at all OUS universities engage in research and scholarship and play important roles in new knowledge creation and innovation**. The following examples illustrate just some of the many benefits research brings:

- OSU reseachers have developed and released 10 wheat varieties since 2002 that thrive in the relatively mild, but damp conditions of the Willamette Valley as well as the drier, hotter Columbia basin. In 2011, **OSU-developed wheat varieties accounted for 592,000 acres, 76% of all winter wheat statewide.** They increased the average yield by five bushels per acre, helping Oregon wheatgrowers generate $17 million in additional revenue.

- After a successful exit from the **UO spinout MitoSciences** (housed in the **UO Riverfront Research Park** as a subsidiary of the public company Abcam) in 2011, Dr. Michael Marusich founded mAbDx. An immunodiagnostics company specializing in creating novel immunodiagnostics through biomarker discovery and immunoassay development, mAbDx is developing effective diagnostics for diseases characterized by the common features of great clinical urgency and unmet diagnostic needs. The firm will soon be the first company in the new Lewis Integrative Science Building's designated corporate research and development space.
- **The Green Building Research Laboratory** in the Maseeh College of Engineering and Computer Science at PSU brings university researchers from across Oregon and beyond to work in close collaboration with industry partners to **solve the fundamental and applied research needs of the green building industry.** The Laboratory was launched through support of the **PSU Institute for Sustainable Solutions (ISS)** and other partners.

OUS Signature Research Centers

Through collaboration, Oregon's public universities have been able to share the best minds, research equipment, and resources through several inter-institutional Oregon signature research centers. While different universities take the lead on some of these, each represents inter-institutional research efforts and world-class research agendas. **The Oregon Nanoscience and Microtechnologies Institute** (ONAMI) —a collaboration between OSU, PSU, UO and the Pacific Northwest National Lab—focuses on growing research capacity and competitiveness, commercializing new technologies, and supporting start-up companies. **The Oregon Translational Research and Drug Development Institute** (OTRADI) —a consortium of OHSU, OSU, UO, PSU and several Oregon-based biotech companies—connects research, development, and commercialization in the area of infectious diseases. **The Oregon Built Environment and Sustainable Technologies** (Oregon BEST) signature research center—partnering with OSU, OIT, UO, and PSU—connects research and commercialization efforts in areas of sustainable built environment and renewable energy. **The Institute for Natural Resources** (INR)—a partnership of OSU, PSU, and OUS—provides policy makers with current, science-based information to identify, investigate, and offer solutions to natural resources challenges. **The Oregon Transportation Research and Education Consortium** (OTREC)—a partnership between PSU, OU, OSU, and OIT—conducts research on sustainable surface transportation, educates current and future transportation leaders, and encourages real-world use of research results.

Examples of Campus Research Centers:

Much of the research conducted on OUS campues is based within departmental and interdisciplinary **institutes and centers** serving Oregon and global needs. Examples include:

EOU's Community-Based Rural Research Internship Program, in partnership with the Eastern Oregon Regional Solutions Center, matches state agencies with faculty-supervised student research interns to help communities solve problems ranging from industry and economic development to land use and public health throughout rural Oregon.

OSU's Northwest National Marine Renewable Energy Center (NNMRC) is a partnership with the University of Washington, funded by the US Department of Energy, focused on investigating and advancing tidal and wave energy.

PSU's Institute for Sustainable Solutions is a multi-disciplinary research and innovation center dedicated to designing a greener and more prosperous future for the region.

Oregon Tech's Geo-Heat Center, located on the Klamath Falls campus, provides technical analysis for companies and communities actively involved in geothermal development. The ***Oregon Renewable Energy Center,*** established by the legislature in 2001, supports applied research and technical assistance on the application of renewable energy.

SOU's Southern Oregon University Research Center (SOURCE) is a hub for applied research and analysis in Oregon. SOURCE completes program evaluations, survey research, implementation studies, and economic analysis for the region.

UO's Lorry I. Lokey Laboratories provide world-class nanoscience research capabilities, serving as a high-tech extension service to scientists and industry.

WOU's Teaching Research Institute is a network of research centers and work groups focused on improvingthe quality of life for all Oregonians, especially children and people with disabilities.

[i] Ranking includes all OUS institutions and OHSU.

[ii] Expenditures for sponsored research and other activities using grant funds from external sources. Includes restricted fund expenditures for sponsored research, teaching/training grants, student services grants, library grants and similar support, but excludes student financial aid.

Kudos & Facts

Oregon TECH

- Oregon Tech graduates enjoy an outstanding success rate, with 90 percent either employed or enrolled in graduate school within six months after graduation.
- The average starting salary for Oregon Tech graduates is $56,000 per year.
- *Payscale.com* noted that Oregon Tech has the highest starting salaries and the highest mid-career salaries of any university in Oregon; in addition, Oregon Tech graduates' starting salaries ranked 38th out of 1,058 colleges and universities in the nation.
- With a student-to-faculty ratio of 20:1, Oregon Tech provides a hands-on learning experience.
- Oregon Tech secured the #10 spot among best baccalaureate colleges in the Western Region in the 2013 "Best Colleges" edition of *US News & World Report*.
- Oregon Tech's undergraduate engineering programs are ranked 35th in the nation in US News & World Report's 2013 "Best Colleges" edition.
- *Forbes*' Magazine ranked Oregon Tech among the top 20 percent of all four-year and graduate universities in the nation in their annual ranking *of America's Top Colleges*.
- The university was named to the 2013 "Military Friendly Schools®." The list honors the top 15 percent of colleges, universities, and trade schools that are doing the most to embrace America's military service members, veterans, and spouses as students and ensure their success on campus.
- In 2005, Oregon Tech introduced the first Bachelor of Science in Renewable Energy Engineering in North America. This ABET-accredited program was introduced in Portland and later expanded to Klamath Falls. The department introduced a Master of Science in Renewable Energy Engineering in 2011.

- Oregon Tech is home to the Oregon Center for Health Professions, established by the state legislature in 2005. The center is named for the late Oregon Tech President Martha Anne Dow. Nearly a decade ago, President Dow envisioned a top-notch facility like the one that now bears her name that would train new generations of health-care professionals.

Learn more about Oregon Tech's accomplishments! Visit www.oit.edu/kudos.

- The Civil Engineering Department was awarded the 2012 Walter LeFevre Award by the American Society of Civil Engineers for promoting professionalism, licensure, and ethics.
- The Oregon Renewable Energy Center (OREC) was established in 2001 at Oregon Tech. OREC promotes energy conservation and renewable energy use in Oregon and throughout the Northwest through applied research, educational programs, and practical information.
- Oregon Tech's Klamath Falls campus is currently the only university in the world that is completely heated by geothermal water, and has the first university-based geothermal combined heat and power plant.
- Oregon Institute of Technology opened its Wilsonville campus in September 2012. The new state-of-the-art campus offers an industry-focused, urban university experience to students in the Portland metro area.
- The Oregon Tech Hustlin' Owls men's basketball team won the NAIA Division II National Championship in 2012, marking their third national championship. The team has made 17 NAIA Division II Tournament appearances.
- Men's basketball coach Danny Miles started his 42nd campaign at Oregon Tech this year. Miles ranks second in wins among all men's college basketball coaches in history.
- The Lady Owls Softball Team brought home the NAIA National Championship in 2011.
- Many of Oregon Tech's courses and programs are offered online, and our online presence was ranked 7th in the nation for blind and visually impaired students in the *Chronicle of Higher Education*

- Dr. Mateo Aboy, Associate Provost for the Wilsonville Campus, was named one of the *Portland Business Journal's* "40 Under 40" in 2013.

www.oit.edu

Hands-on education for real-world achievement

Oregon University System

ENGINEERING AND TECHNOLOGY INDUSTRY COUNCIL:

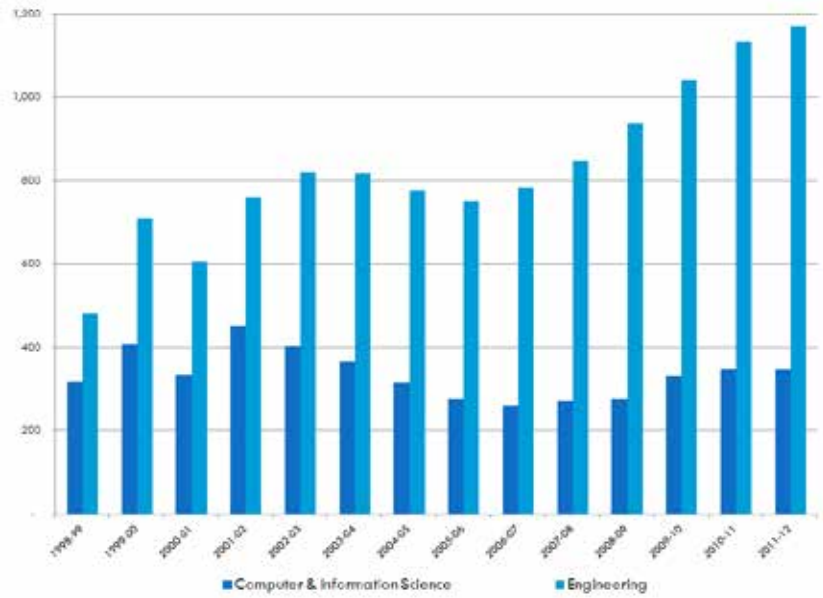
BACKGROUND DOCUMENTS

Monday, March 25, 2013

ETIC: BUILDING AN ENGINEERING & TECHNOLOGY WORKFORCE FOR OREGON

Founded in 1997, the Oregon Engineering & Technology Industry Council (ETIC) is a public-private partnership that guides and implements the state's strategic investments in engineering and technology education, and increases research and innovation at Oregon's public universities to foster economic growth. **ETIC investments give Oregonians the skills and opportunities to prosper in STEM careers and meet workforce needs**. They serve the hiring needs of employers across all Oregon industries and they allow these companies to create products and services that spur job growth and draw dollars into Oregon's economy.

Chart A. Sophomore Engineering Enrollment at ETIC-Supported Institutions



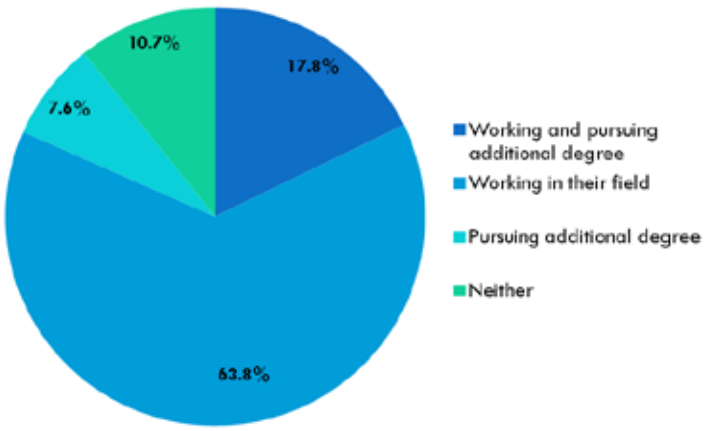
A partnership producing results

ETIC investments have **dramatically increased engineering graduates** and **external funding of engineering research** in Oregon. Goals and accountability for results guide ETIC's work, aided by a Board made up of members of the business community and university faculty and staff.

ETIC's use of metrics and industry oversight has produced a **16-year record of real results** for Oregon:

- State investments have been matched by **private dollars by almost 2-to-1** over 13 years.
- **Undergraduate engineering enrollment has more than doubled.** (See Chart A[1])
- **Almost all recent ETIC graduates have found professional employment or are**

Chart B. Employment of Recent ETIC Graduates



[1] Computer science enrollment surged temporarily about 8 years ago but dropped back to previous levels after the dot com bust, reflecting a nationwide trend.

pursuing an additional degree (See Chart B)

§ **In spite of this excellent progress, the supply-demand gap is widening.** At current graduation rates, Oregon will produce only 40% of the highly educated graduates that Oregon's employers will need over the next ten years. (See Chart C.)

Chart C. Demand for ETIC Graduates

Non-management technical positions in Oregon filled by Oregon graduates

◊ Using 10-year employment projections provided by Oregon Department of Oregon
◊ Using what Department of Labor considers competitive education for the forecasted positions
◊ Assuming current graduate rates at Oregon colleges and universities

Strategic Investments Benefit Students and Future Employers

The ETIC budget underwrites highly productive faculty that teach engineering courses and attract research dollars to Oregon – **increasing Oregon's innovation and research capacity.** The graduates allow Oregon companies to compete in today's borderless economy. ETIC supports the crucial need to **fulfill the workforce needs of all Oregon industries** because engineering and technology cross all sectors' need for well-trained, highly skilled technical professionals, and their ability to deliver products and services.

ETIC funding supports:

§ faculty and researchers in areas important to Oregon's economic growth;
§ classroom and laboratory improvements to provide students training in facilities that ensure they are work-ready; and
§ pre-engineering education programs that help prepare and motivate K-12 students to enter engineering and applied science college degree programs.

Investments in the ETIC budget would continue the important momentum gained over the last decade, retaining top faculty, fostering growth in federal research dollars and private support, and producing highly trained graduates and research to support economic growth for Oregon.

ETIC History

Created by the Oregon Legislature in 1997, ETIC has a proven track record of producing measurable results for Oregon in leveraging private and public support.

Industry Members

Bend Research, Inc. | CH2M Hill | CorSource Technology Group | Electro Scientific Industries | Hewlett Packard | IBM Corporation | Intel Corporation | KPFF Consulting Engineers | Performance Health Technology | Tektronix, Inc. | Timbercon, Inc. | WebMD |Xerox

Association Members

Associated Oregon Industries | Oregon Bioscience Association | Oregon Business Association | Technology Association of Oregon | TechAmerica

Academic Members

Eastern Oregon University | Oregon Health & Science University | Oregon Institute of Technology | Oregon State University | Portland State University | Southern Oregon University | University of Oregon | Western Oregon University

For more information, contact Bruce Schafer, ETIC Executive Director, at Bruce_Schafer@ous.edu **or 503-725-2915, and visit www.oregonetic.org.**

Oregon University System | 2013 Legislative Issue Brief Higher Education

STEM: PREPARING STUDENTS FOR WORK, GROWING OREGON'S ECONOMY

STEM Fuels Oregon's Economy

From industries across the country to the federal government to Oregon's top state economists, all say the same thing: **the economic prosperity of every state and the country is reliant on increasing the number of students with higher education degrees**, especially those in Science, Technology, Engineering, and Math, also known as STEM. Economists agree that more than half of the economic growth since WWII has come from technological innovation, which makes our industries competitive, drives exports, and supports high-quality jobs. This is why demand for STEM workers has increased, even in non-STEM fields, due to the wide spread use of technology across industries and occupations.

States without a rich supply of STEM-skilled individuals are seeing flat or even decreasing prosperity because they are not able to compete in the national and global economy, where an understanding of how to use technology, research, innovation, and adapt to rapid change are key elements for success. In other words, increasing the number of high school, college and university students majoring and graduating in STEM subjects is critical for Oregon's economic growth and stability.

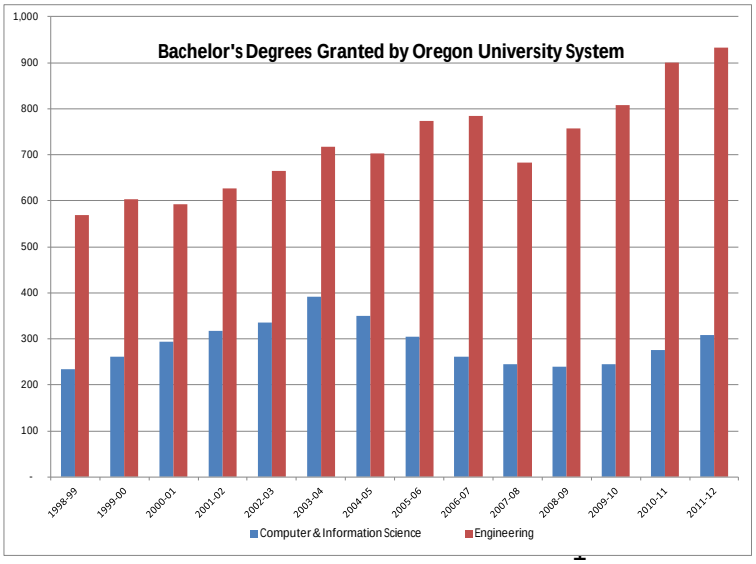
"A rich innovation pipeline plays a pivotal role in a region's industrial development, commercialization, competitiveness, and ability to sustain long-term growth."

From Milken Institute's Best Performing Cities 2010

STEM: Providing Direct Benefits to Oregon

The common need across Oregon right now is jobs, jobs, jobs. How do we attract the companies we need in all parts of Oregon to reignite rural and urban communities hard hit by the recession and impacted by changes in traditional industry sectors? **STEM jobs can anchor Oregon's local and regional economies** in ways which have multiplier effects that help grow healthy, stable communities. Over the last decade, STEM jobs grew three times faster than non-STEM jobs; and are expected to increase by 17% between 2008 and 2018, compared to 9.8% growth for non-STEM jobs. In 2010, the national unemployment rate for STEM workers was 5.3%; for all other occupations it was double that figure.

Catalyzing growth in high-wage STEM jobs filled by Oregonians who pay above-average income tax is a win for everybody, especially in a state so dependent on income-tax revenues. It keeps and brings in companies and jobs that contribute to family-wage jobs and provides Oregonians with work that would otherwise go to employees imported from other states or countries. The average annual wage for all STEM occupations was $77,880 in May 2009, well above the national average of $43,460 for non-STEM occupations.



Addressing Oregon's Skills Mismatch

In Oregon, like the rest of the country, businesses remain frustrated by the skills mismatch: jobs that go vacant because available workers do not have the skills to fill them. While some countries provide high levels of support for generating a STEM workforce—with 40% of Chinese college graduates holding a STEM degree—in the U.S. only 13% of graduates have degrees in STEM.

The number of bachelor of science degrees in engineering awarded over the past 15 years has barely grown nationally. In Oregon, we have seen growth in engineering- and technology-related degrees during the

years when investments have been directly into university degree programs through Education & General funding, and through investments made in the programs of the Engineering and Technology Industry Council (ETIC).

Filling the STEM Gap

To continue to gain from the social, economic, and other benefits that come with critical mass in STEM areas, experts estimate that the U.S. must produce approximately 1 million more STEM professionals over the next ten years, an increase of 30%. **For Oregon, this means increasing annual STEM graduates from about 3,800 to about 5,000**. The payoff: states with a strong STEM workforce are insulated to a much greater extent from the economic ups and downs that Oregon has faced because our workforce cannot attract enough large, medium, and small companies who need engineering and technology-capable workers for many different types of positions.

ETIC Pre-College STEM Programs: Building a Bridge

Given rapid STEM job growth and the difficulties that businesses are experiencing in filling STEM openings, it is imperative that Oregon support efforts to ensure the state increases the number of degree and certificate holders who are qualified to enter STEM fields.

This continues to be the focus of ETIC, and its pre-college initiative called the Oregon Pre-engineering & Science Initiative (OPAS), which is a collaboration of industry, non-profit, and public educators and leaders. OPAS is helping achieve ETIC's goal of increasing the number and diversity of Oregon students pursuing engineering and similar fields at colleges and universities. OPAS develops and implements strategies that expand formal and informal educational opportunities in pre-engineering, computer science, and other applied sciences for students in middle and high school.

Experts cite many reasons that the U.S. is behind in producing STEM graduates: lack of rigorous K-12 math and science standards; lack of qualified teachers; lack of preparation for college-level STEM study; failure to motivate student interest in math and science; and failure of education sectors to meet STEM job demands, often due to funding cutbacks in both K-12 and higher education, as well as low to no targeted STEM funding.

STEM: Aligned with Oregon's Education Reform Efforts

STEM is critical to and aligned with many education reforms being undertaken today in Oregon, from the Achievement Compacts to Common Core State Standards to the innovative pre-college programs for K-12 students breaking new ground in effective teaching and learning that are sponsored by Oregon University System campuses, nonprofits, and state and federal grants to K-12. Helping students make the connections between STEM and their future career opportunities is a key outcome of programs engaged in narrowing the STEM gap.

Those states that are working to increase STEM graduates, including Oregon, have done several things to grow the number and quality of their STEM graduates:

- adopted rigorous math/science standards and improved assessments; Oregon is doing this through Common Core State Standards and we're ahead in this;
- provide more rigorous prep for STEM students, such as pre-college learning, bridge programs between high school and college;
- use informal learning to take math and science beyond the classroom such as out-of-school programs;
- built up the quality and supply of STEM teachers, which continues to be a challenge because of the higher wages and employment opportunities outside of teaching; and
- established goals for postsecondary education to meet STEM job needs.

Oregon has been engaged in all of these, but for some areas, such as pre-college programs, efforts are not to scale because of the small size of many of the outreach programs offered by the universities and through ETIC. As state funding has decreased in recent biennia, campuses have been able to sustain many of these programs, but not always grow their capacity. Despite the growing need for pre-college programs, the resources have been stagnant, compounded by lower overall external grants during the recession. Thus only a small proportion of

the students who need pre-college enrichment programs in order to be prepared academically and otherwise for college have access to them.

OPAS and ETIC Programs and Outreach

Specific ETIC/OPAS sponsored and supported programs engage students in the instructional practices that research has shown to be more effective in raising STEM achievement:

- Working with K-12 on STEM curricular improvements and standards, inclusion of engineering design at all K-12 levels, and professional development programs for teachers;
- Increasing funding for a variety of STEM programs, both in class and outside of school time that focus on pre-engineering experiences and enrichment, while developing college-going aspirations, including: SuperQuest[1]; Engineering Coaching And Mentoring Program[2]; Mathematics Engineering Science Achievement[3]; Project Lead the Way[4]; Saturday Academy Apprentices in Science & Engineering[5]; Science & Math Investigative Learning Experiences [6]; and Oregon Robotics Tournament and Outreach Programs[7];
- Helping universities, community colleges, and high schools align curricula so students have a smooth transition from one level to the next and are academically ready to succeed;
- Increasing underrepresented students in engineering and applied sciences, including students of color and women; and using college students to engage K-12 students in engineering (National Engineers Month, and Student Envoys in Engineering);
- Increasing the college freshman retention rate in engineering and computer science so students do not get discouraged or leave the field as this is a critical component in increasing STEM workers; and
- Growing consensus on strategic directions for engineering and applied science education among public and private stakeholders.

STEM Gives Students Tools for Life

Even for students who eventually pursue non-STEM fields, engaging them in math, science, engineering, and technology in K-12 and college has many beneficial learning outcomes applicable no matter what they do in life. Proficiency in STEM helps gives students valuable skills: using critical-thinking to recognize a problem; using STEM concepts to evaluate a problem; and correctly identifying the steps needed to solve a problem even if not all the knowledge to complete the steps is available.

STEM: It's good for Oregon

Oregon is making progress on improving the size and quality of its STEM workforce, but it is too slow to meet the needs of our companies, of all sizes and in all parts of the state. Everyone agrees that we need to reach more students, early and often, with engaging STEM curricula and hands-on programming that are meaningful. Research shows us what is working. ETIC, through the OPAS initiative, is helping to move the state forward in meeting STEM workforce needs. With increases in targeted funding, we can truly make headway by offering programs and outreach to more students, and more diverse students, and by building capacity in proven programs that work.

Sources: Building a Science, Technology, Engineering, and Math Education Agenda (2011); Engage to Excel: Producing One Million Additional College Graduates with Degrees in Science, Technology, Engineering, and Mathematics: A Report by the President's Council of Advisors on Science and Technology (2012); Center on International Education Benchmarking (2012); Increasing the Number of STEM Graduates: Insights from the US STEM Education & Modeling Project (2012); U.S. Congress Joint Economic Committee, STEM Education: Preparing for the Jobs of the Future (2012); Pennsylvania's Best Investment: The Social and Economic Benefits of Public Education (2011).

[1] www.techstart.org/superquest
[2] getreal.ous.edu/echamp
[3] oregonmesa.org
[4] www.oit.edu/pltw
[5] www.saturdayacademy.org/ase/default.aspx
[6] smile.oregonstate.edu
[7] www.ortop.org

Oregon University System

EDUCATION CONTINUUM: SERVING PK-20 STUDENTS THROUGH COLLABORATIONS: BACKGROUND DOCUMENTS

Tuesday, March 26, 2013

INCLUSION AND ENGAGEMENT OF OREGON'S DIVERSE POPULATION

The Oregon University System strives to enhance the representation, inclusion, and engagement of broadly diverse populations through a variety of initiatives. Ongoing equity efforts are focused on supporting diversity in student access and success, faculty and staff employment, vendors and contracting, and other areas. The State Board of Higher Education recognizes that strategies that serve the needs of underserved student groups are important to close gaps in student success, increase degrees, and support the economic mobility and potential civic, cultural, and economic contributions of all Oregonians for the benefit of us all.

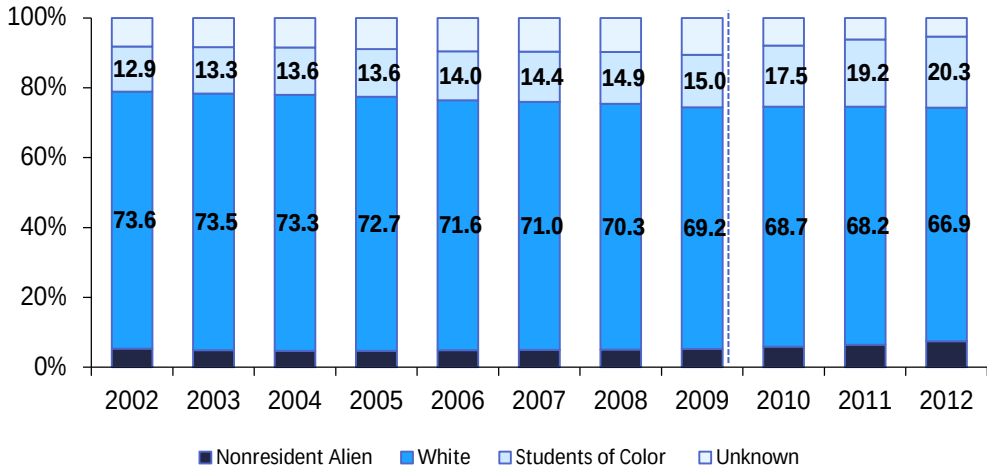
Representation and Success of Ethnically Diverse Populations

Activities that promote inclusion and engagement create environments that are progressive and responsive, provide benefits for all OUS populations, and recognize the achievements of all participants. **The past decade has seen strides in the representation of diverse populations within OUS** — driven by commitments from the Board and campus leaders, and collaborative participation by Oregon communities and other educational stakeholders — though the factors remain complex. Steady increases in the proportion of students of color (see chart[1]) have helped OUS institutions become more diverse, multicultural campuses. **In fall 2012 OUS enrolled 101,393 students of whom 20.3% are students of color, up from 12.9% ten years ago, and 52.4% are women**.

OUS institutions employ a significant component of Oregon's workforce, with **approximately 15,168 total OUS faculty and staff, of whom 54.6% are women and 11.1% are people of color.** The OUS has also made strides in increasing the number of its contractors that are minority-owned businesses, and in its outreach to minority business communities. The OUS Retainer Program for construction-related services reflects these efforts with an increase in projects awarded to the Minority, Women & Emerging Small Business (MWESB) community from 19% in 2011 to 25% of the total number of contract supplements in 2012.

Enrollment by Racial/Ethnic Group, Fall 2002 through Fall 2012

(Students of Color Grouped in a Single Category)



[1]Comparing data after 2010 with earlier years is problematic due to category definitions having changed. In 2010, the federal government modified the self-identifying survey options on ethnicity, with the result that that students that may have historically identified with one category may now report their identity differently, creating some inconsistencies with longitudinal data.

Addressing the Needs of a Changing Student Pipeline

In order to reach the 40-40-20, leaders are acknowledging that the PK-20 education system needs to better serve first-generation students and students of color**. The fastest growing youth populations are among Oregonians who currently have low high school completion and college-going rates.** While Oregon's number of high school graduates is expected to decline or hold steady in the next decade, they are also becoming significantly more diverse in race/ethnicity. **Oregon can expect dramatic growth in the number of students of color, particularly Latino residents**. In the 20-year period from 2008-09 to 2028-29, Hispanic/Latino public high school graduates are expected to nearly triple from approximately 4,400 to 12,300, an increase from 12% to 33% of all Oregon public high school graduates. Correspondingly, among the White non-Hispanic/Latino demographic, high school graduates are projected to decline by 19%, or about 5,000 students.

Enrollment, retention, and graduation rates at OUS vary among student ethnicities. OUS students of racial/ethnic minority status graduate at slightly lower rates than non-minority students on average, and overall Oregon degree attainment rates for American Indian/Alaska Natives and Hispanics are below the regional and national average.[2] For first time freshmen entering an OUS institution in 2005, 39.3% of African American students, 55.3% of American Indian students, and 53.2% of Hispanic/Latino students graduated within 6 years, while Asian/Pacific Islander students graduated within 6 years at nearly identical rates to White students at 60.9% and 61%, respectively. These statistics show the need for more equitable access and support systems that address the education, social, health and other factors that keep students from fulfilling their potential before and during college.

Increased emphasis on student success and retention by OUS campuses has led to significant improvement in six-year graduation rates for entering freshmen, and campuses have a wide range of strategies and initiatives to keep improving success for diverse and underserved populations. Additional statewide efforts such as Oregon GEAR UP provide services that support many first-generation, rural and low-income students in learning about and aspiring toward college. Because many underserved students have financial need and are also first-

Examples of Campus Strategies

EASTERN OREGON UNIVERSITY holds an annual **Celebrate, Educate & Appreciate Diversity conference** and has a Student Council for Multicultural Affairs which provides advocacy and programming that foster understanding and contribute to multicultural awareness across campus. Their **graduation requirements** also include a diversity requirement.

OREGON INSTITUTE OF TECHNOLOGY'S **Tech Opportunities Program** has a track record of success for students with disabilities and first-generation and low-income students, combining personal tutoring, peer mentoring, and academic advising.

OREGON STATE UNIVERSITY'S **Educational Opportunities Program** provides individualized academic counseling, small-section size math and writing courses and academic enrichment for underserved students. Science and engineering offer two cohort-based **summer bridge programs** for diverse STEM students accepted at OSU, as well as tutoring and undergraduate research opportunities to support bridge participants' academic success and retention.

PORTLAND STATE UNIVERSITY'S **Diversity Scholarship Program** is designed to increase retention rates for first generation and high need students from diverse, multicultural backgrounds. PSU's **GANAS program—Gaining Awareness & Networking for Academic Success**—uses a year-long, cohort-based mentoring approach to improve retention of Latino students.

[2] *Knocking at the College Door,* Projections of High School Graduates, 2012, WICHE.

generation college students, challenged by the unfamiliar university environment, campuses provide on-campus programs and social networks of peer and advisor support, and target students for dedicated retention and financial aid efforts (see campus examples).

OUS Diversity Policy

The Board adopted an OUS Diversity Policy in 2009 to guide diversity principles and actions. The policy includes seven guiding principles: **1) Overall Commitment to Diversity, 2) Commitments to Workforce Enhancements, 3) Equity in Student Access, 4) Welcoming Campus Environments, 5) Vendor and Contracting Enhancements, 6) Continuous Feedback, and 7) Key Goals.** For leadership, this policy provides a framework for action and accountability, and the Board conducts performance reviews annually to assess outcomes of the Board, the Chancellor, and campus presidents.

Performance Measurements and Achievement Compacts

Under the leadership of Governor Kitzhaber and the Oregon Education Investment Board (OEIB), the OUS overall, each OUS institution, and other education sectors have developed Achievement Compacts which detail measurements to inform and guide their work. Reported outcomes and targets toward 40-40-20 completion rates for all Oregonians are a major component of the Compacts. **Within outcome measures, Achievement Compacts denote actual figures for all Oregonians as well as disadvantaged students, who are defined as being either a member of an underrepresented racial or ethnic group and/or eligible to receive a Pell Grant**. In the 2012-13 Achievement Compacts, the number of underrepresented minority Oregonian students receiving bachelor's degrees in 2010-11 was reported as 1,063; bachelor's degrees to minority students for 2011-12 were projected at 1,138; and targets for 2012-13 were 1,196. OUS produced 274 more bachelor's degrees to underrepresented minority Oregonians in 2011-12 than was projected, for a total of 1,412 degrees. In addition to these measures, OUS assesses and reports data on enrollment and retention as well as other metrics integral to the OUS mission in annual performance reports to the Board and Legislature, in reports exploring critical issues, and in the OUS biennial Fact Book.

Campus Strategies, continued

SOUTHERN OREGON UNIVERSITY supports numerous pre-college programs for diverse populations including **Academia Latina, Academia Latina Leadership, and Konaway Nikka Tillicum**, **which are residential academic preparation programs** for middle and high school Latino and Native American students. A variety of bridge and cultural programming promote a more inclusive campus environment for first-generation and low income students, and students of color.

UNIVERSITY OF OREGON self-identified students of color receive specialized guidance, tutoring, and advising through the **Center for Multicultural Academic Excellence (CMAE).** Students in the federal TRIO outreach program have a dedicated advisor and support services, as well as access to the UO's McNair Scholars' Program, which prepares them for graduate study.

WESTERN OREGON UNIVERSITY, the 2012 recipient of Higher Education Excellence in Diversity Award from Insight into Diversity, has a **comprehensive and proactive set of programs** that include mandatory and intentionally overlapping academic advising, tutoring and college transition services for diverse students. The university has bilingual staff in Academic Advising, Financial Aid, Student Enrichment, Student Health and Counseling, Multicultural Student Services and Programs, and the Writing Center.

Oregon University System

EDUCATION CONTINUUM: OREGON GEAR UP: BACKGROUND DOCUMENTS

Tuesday, March 26, 2013

PRE-COLLEGE ACCESS PROGRAMS: ACHIEVING 40-40-20 THROUGH PK-20 COLLABORATIONS

The challenge of "getting into college" goes well beyond a student earning acceptance into a postsecondary program, particularly for low-income students and students of color. Researchers contend that the rising cost of tuition, socio-economic disadvantages, and lack of adequate academic preparedness have contributed to under-representation of these groups of students on college and university campuses and in completing degrees. To meet these challenges, the **Oregon University System and all of its campuses offer a wide range of precollege activities. These are designed to increase the number of underrepresented students who are prepared to enter and succeed in postsecondary education**.

Across all seven campuses and the Chancellor's Office, over 90 programs serve more than 200,000 students each year. These programs range from intensive college visits, to residential camps that help students hone their academic skills. Some of these programs focus specifically on Science, Technology, Engineering, and Math (STEM) education (SMILE at OSU, MESA at PSU, and Project Lead the Way at OIT), while others offer more general college preparatory assistance (Youth Programs at SOU, Making College Happen at WOU, Eastern Promise at EOU, and Summer Academy to Inspire Learning at UO). The OUS Chancellor's Office manages **statewide programs—**Oregon GEAR UP, College Access Challenge Grant, and the American College Application Campaign — all of which partner with schools, colleges and community-based organizations to increase the likelihood that more low-income students will pursue some form of postsecondary education that will prepare them for the workforce and to contribute to the Oregon economy.

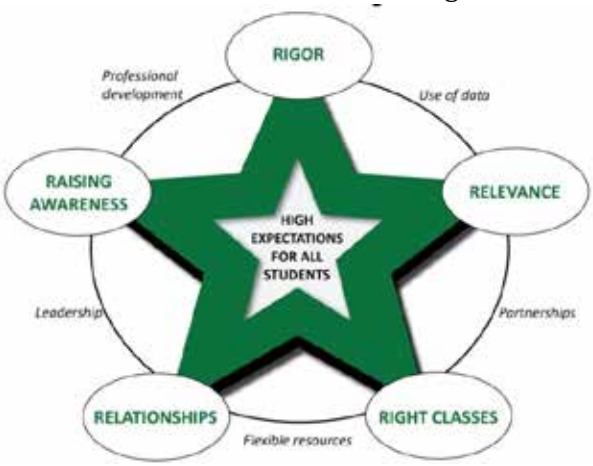
GEAR UP Prepares Students for College and Workforce Success

Gaining Early Awareness and Readiness for Undergraduate Programs, or GEAR UP, is a six-year program designed to increase the number of low-income students who are prepared to enter and succeed in postsecondary education. The program began in Oregon in 2002 with a six-year grant from the US Department of Education. **OUS received a second federal grant in 2008 that supports selected schools through 2014. Beginning in the fall of 2011, ten new districts brought GEAR UP to their schools, thanks to additional funding from The Ford Family Foundation. Serving students in rural Oregon is the focus of both grants,** recognizing the unique challenges faced by these schools in preparing students for postsecondary education. Schools in rural areas share characteristics, including difficulty in securing these types of grants on their own, that make it possible to serve more students by leveraging resources and technical assistance more effectively.

A total of 22 Oregon school districts receive annual GEAR UP grants of $30,000 to $45,000 to support efforts that set high academic expectations and create support structures to ensure student success. Middle and high school staff in these districts design and carry out most of the GEAR UP program activities, while OUS staff and our partner organizations offer curriculum support, mentoring programs, college campus-based events, and additional services to the schools that help make students successful. Students who participate in their schools' GEAR UP activities may be eligible for college scholarships and/or matched college savings accounts to help offset the cost of their education. Thus, GEAR UP students receive the knowledge, preparation and the capital necessary to fulfill their aspirations to higher education.

The program's research-based "5 R Model" starts with high expectations for all students and is based on research findings[i] that boil down to five key components that lead to student success in college:

- Rigor: strong academic preparation
- Right classes: early awareness of the courses necessary to prepare them for their chosen postsecondary path
- Relevance: educational plans that are driven by career goals
- Relationships: positive peer influence reinforced by caring adults
- Raising awareness: reliable information for them and their families about college affordability and financial aid, as well as navigating selection and admissions processes.



College-going rates from schools that participated in the first grant from 2002-08 have displayed a clear and continual increase since the program ended. Before GEAR UP came to those schools, 48% of students were attending some form of postsecondary education according to the National Student Clearinghouse. The class of 2011 bested that average by 7%.

College Access Challenge Grant (CACG)

The Chancellor's Office has successfully managed the College Access Challenge Grant (CACG) on behalf of the state for the past four years. This federally-funded formula grant program is designed to foster partnerships among government entities and philanthropic organizations to significantly increase the number of underrepresented students who enter and remain in postsecondary education. **The majority of this $1.5 million (annual) grant has been sub-granted to colleges, schools, and community-based organizations directly serving low-income and first-generation students. Over the last two years, 33 organizations across the state were awarded $2.4 million and served more than 26,000 students.** Due to the state's inability to meet its maintenance of effort requirement for this grant, Oregon no longer receives these funds. However, many of the organizations served during the most recent years have sustained the programs started with the CACG funds and have developed strong working partnerships with other funded groups in order to leverage their resources even further.

American College Application Campaign

The Chancellor's Office piloted the American College Application Campaign, an initiative of the American Council on Education in Fall 2013. Seven local pilot sites hosted activities for this inaugural event, at which 394 seniors and GED candidates submitted 583 applications to 111 colleges and universities in 28 states. We will monitor these students to determine whether or not they enter into postsecondary education next year. This is a very low-cost initiative with positive results both locally and around the country.

[i] "Reclaiming the American Dream" published by the Bridgespan Group; "Improving College Access for Minority, Low-Income, and First-Generation Students" from the Pathways to College Network publication entitled; and "Helping Students Navigate the Path to College: What High Schools Can Do" from the Institute of Education Sciences.

OREGON GEAR UP

Gaining Early Awareness and Readiness for Undergraduate Programs

CREATING A COLLEGE-GOING CULTURE

engaging students, parents and the community

Oregon GEAR UP **Annual Report 2011-2012**

Dear Fellow Oregonians,

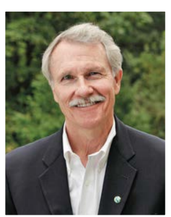
For the first time in Oregon's history, young adults are less educated than their parents' generation, with fewer high school diplomas, college certificates and degrees. Therefore, programs like GEAR UP are even more imperative to provide students, parents and educators the expectation, motivation, and resources to continue on to education after high school.

As a state, we have declared that one of our top priorities is delivering a rigorous, seamless educational system which starts with early childhood programs and culminates in the attainment of advanced degrees. GEAR UP spans the formative years in the middle of the education pipeline, connecting students in 7th-12th grades with the tools, information and capital to succeed in our community colleges and universities. Their work, in conjunction with the state's new education achievement compacts which emphasize career and college readiness, will help Oregon reach our 40-40-20 goal for 2025 – that is, all Oregonians will earn a high school diploma or its equivalent, 40 percent will go on to earn an associate's degree or credential, and 40 percent will earn at least a bachelor's degree.

I commend the communities that have embraced GEAR UP and its mission; our social, civic and economic objectives depend on it. I also applaud the drive and dedication of the educators, parents, students and staff that aspire toward higher education for all students.

Sincerely,

John Kitzhaber, M.D.
Governor



7th graders at Camas Valley School celebrate National GEAR UP Week

Contents

Colorful college brochures adorn and inform GEAR UP school walls.

Greetings,

What does it mean to create a "college-going" culture? How does one measure culture? It isn't easily quantified, but if we consider the definition of culture, it does help us think about how we might not only measure, but actually influence a culture. Broadly speaking, culture is made up of the behaviors and beliefs that are characteristic of a particular group or community. These observable characteristics might include language, art, symbols, clothing, and other physical manifestations of the things we value. Placing that lens on the school communities with which we work, I look for visual cues that tell me what a community considers important. It is always refreshing to see pictures of students and where they will attend college displayed just as predominantly as the athletic trophy case. It makes me smile when I hear a teacher say to her classroom "This will be important *when* you go to college" as opposed to *if* you go to college. Many of our schools have intentionally designated days of the week when the entire community wears their college t-shirts as a way to spark conversations and bring greater awareness to the fact that many members of that community have attended or plan to attend some form of postsecondary education.

We can dramatically change our cultures to not only value college, but also provide students with the support they need to succeed: by making seemingly small changes in our language that imbue a sense of high expectations for all students, celebrating academic achievements with the same vigor we do athletic ones, rewarding seniors with a signing ceremony to acknowledge their acceptance to college, and prominently displaying artwork and symbols that suggest to students that their next step is college. I hope you'll take some time to read more about how the 22 GEAR UP communities across the state are undertaking this very important work. Our Governor and legislature have established a very audacious goal for the state that we are actively working to support—that by 2025 100% of our students will successfully graduate from high school and 80% of them will go onto some form of postsecondary education. We know we have a long way to go to achieve both of these, but these communities have rolled up their sleeves and gotten busy. I am inspired by their work, and I know you will be as well.

All my best,

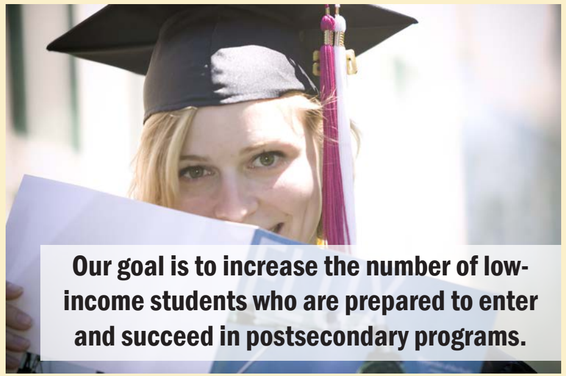
Stephanie Carnahan,
Director, Oregon GEAR UP

What is GEAR UP?

COLLEGE. It's not a dream, it's a plan.

That's our motto at Oregon GEAR UP, and it guides our work with middle and high schools around the state. Our goal is to increase the number of low-income students who are prepared to enter and succeed in postsecondary programs by working with school districts, colleges and universities, and a variety of partner organizations.

GEAR UP—which stands for Gaining Early Awareness and Readiness for Undergraduate Programs—is administered by the Oregon University System and began in 2002 with a six-year grant from the United States Department of Education. We received a second federal grant in 2008 that supports selected schools through 2014 and beginning in the fall of 2011, ten new districts brought GEAR UP to their schools thanks to supplementary funding from The Ford Family Foundation.



Our goal is to increase the number of low-income students who are prepared to enter and succeed in postsecondary programs.

A total of 22 Oregon school districts receive annual grants of $30,000 to $45,000 to support efforts that set high academic expectations, promote early awareness of college opportunities, and engage students in college and career planning. In addition to providing funds, Oregon GEAR UP provides the districts with technical assistance, professional development, and other resources to aid in their college readiness initiatives. Middle and high school staff in these districts design and carry out most of the GEAR UP program activities, while partner organizations offer curriculum support, mentoring programs, college campus-based events, and additional services to the schools.

Students who participate in their schools' GEAR UP activities may be eligible for college scholarships, renewable for up to four years, and/or matched savings accounts. Thus, GEAR UP students receive both the knowledge and the capital necessary to fulfill their aspirations to higher education.

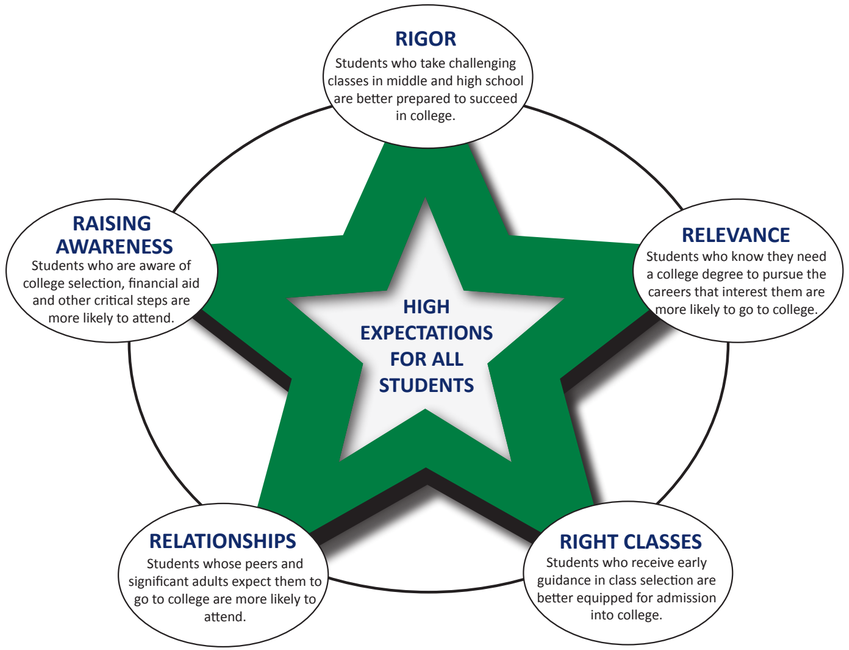
A Model for Change: The 5 “Rs”

Oregon GEAR UP begins with high expectations and emphasizes five key components of effective postsecondary preparation:

- Rigor
- Relevance
- Right Classes
- Relationship
- Raising Awareness

This research-based “5 R” model underpins all school-based and statewide GEAR UP activities.

Schools create yearly plans that incorporate activities and services that address each area, customizing programs for their individual needs.



SAMPLE STRATEGIES

Rigor

- Curriculum alignment
- Dual enrollment at community colleges
- Tutoring and summer school opportunities

Relevance

- Career exploration
- Job shadowing
- Internships

Right Classes

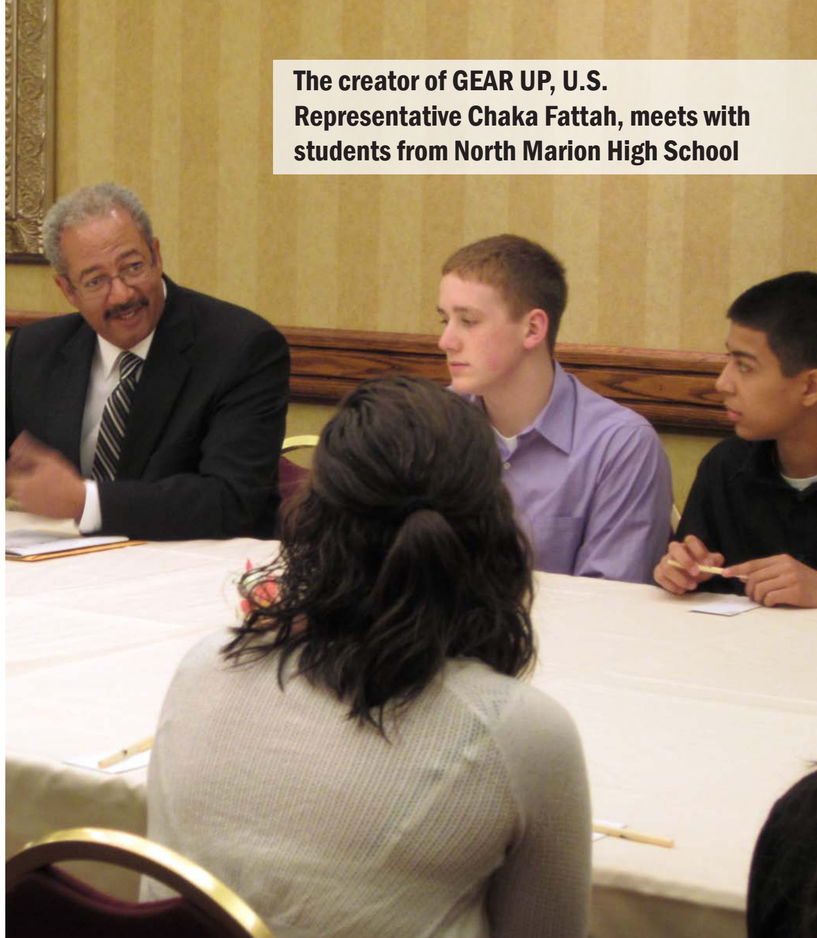
- 5-year education plan for 8th graders
- Educate students, parents, staff, and mentors on the right classes to take

Relationships

- Create student clubs around college
- Match students with peer and adult mentors
- Involve parents in college visits

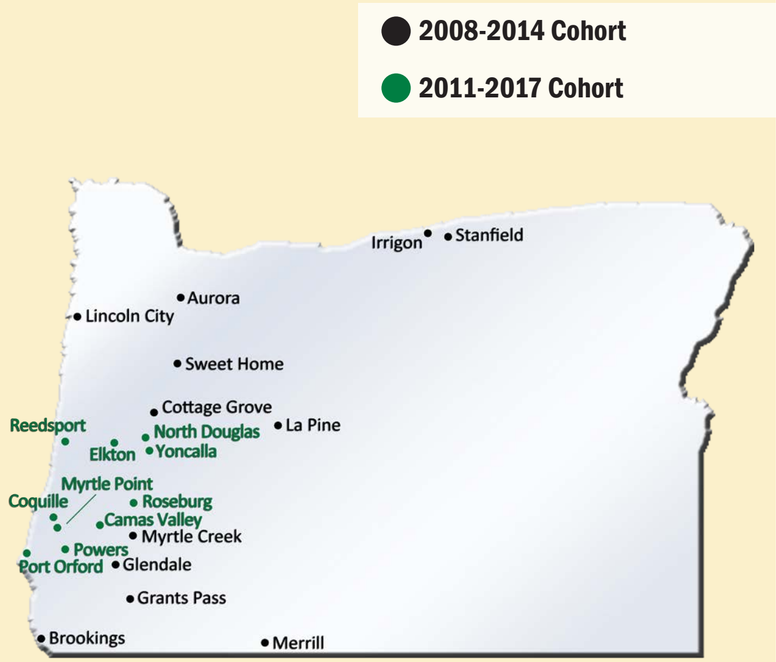
Raising Awareness

- College campus visits and tours
- Provide information on college and financial aid to students and parents



The creator of GEAR UP, U.S. Representative Chaka Fattah, meets with students from North Marion High School

Oregon GEAR UP Communities



Public schools around the state were selected to receive GEAR UP funding based on five criteria: demonstration of need, strong staff commitment to the program, sufficient partner involvement, readiness to engage in school-wide college readiness efforts, and a solid plan for sustaining those efforts beyond the life of the grant. All schools must have 50% or more of the student population eligible for free or reduced lunch.

Federal funds from the U.S. Department of Education support twelve rural GEAR UP clusters from 2008 through 2014. With additional funding from The Ford Family Foundation, ten school districts in Coos, Curry and Douglas counties began GEAR UP activities and services with a cohort of 7th graders in the fall of 2011 continuing through 2017.

The selected middle and high schools began targeting students in the 7th grade. With each subsequent year, a new cohort of seventh graders joins the GEAR UP program so that a college-going culture becomes ingrained in the district.

2008-2014 Cohort

Aurora: North Marion Middle and North Marion High

Brookings: Azalea Middle and Brookings-Harbor High

Cottage Grove: Lincoln Middle, Kennedy High and Cottage Grove High

Glendale: Glendale Jr/Sr High

Grants Pass: Fleming Middle and North Valley High

Irrigon: Irrigon Jr/Sr High

La Pine: La Pine Middle and La Pine High

Lincoln City: Taft 7-12

Merrill: Lost River Jr/Sr High

Myrtle Creek: Coffenberry Middle and South Umpqua High

Stanfield: Stanfield Secondary

Sweet Home: Sweet Home Jr High and Sweet Home High

2011-2017 Cohort

Camas Valley: Camas Valley School

Coquille: Coquille Valley Middle and Coquille High

Drain: North Douglas Elementary and North Douglas High

Elkton: Elkton Charter School

Myrtle Point: Myrtle Point High

Port Orford/Langlois: Driftwood Elementary and Pacific High

Powers: Powers High

Reedsport: Reedsport Community Charter School

Roseburg: John C Fremont Middle, Joseph Lane Middle and Roseburg High

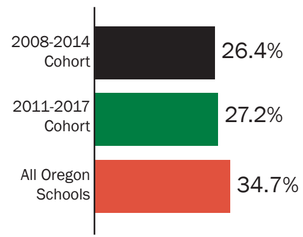
Yoncalla: Yoncalla Elementary and Yoncalla High

WHO WE SERVE

The middle and high schools that comprise both cohorts yield a demographic profile that is fairly representative of rural Oregon. As reflected in the graphs below, the population served by these schools is lower-income and somewhat less ethnically diverse than the state's population as a whole.

Percent of Students Eligible for Free or Reduced Lunch

Percent Minority Student Enrollment



Source: Oregon Department of Education, 2011-12

Impact & Outcomes

In 2011-2012, the GEAR UP program served 5,343 students in 36 schools through counseling and advising services, workshops, educational field trips, and many other school or campus-based activities. In addition, teachers and school staff participated in over 600 hours of professional development that helped spread educational best practices. Furthermore, GEAR UP schools engaged family and community members with over 2,200 parent interactions during the year.

Collaborations with colleges for campus visits and summer programs continued to be a linchpin of almost every school's programming. Students were exposed to over 40 schools, from technical and trade schools to community colleges to public and private 4-year schools both in Oregon and in neighboring states.

A survey of the 2008-14 schools found positive attitudes among parents, students, and educators in their expectations of student educational attainment. GEAR UP fosters these expectations, providing the resources necessary to turn these dreams into reality.

SUPPORTING STUDENTS

5,343
students served

with 69,199
student interactions

INCLUDING:

COUNSELING & ADVISING • WORKSHOPS • EDUCATIONAL FIELD TRIPS • SCHOOL CLUBS • COLLEGE AND CAREER FAIRS • FINANCIAL AID NIGHTS • JOB SHADOWING • MENTORING PROGRAMS • CAMPUS VISITS • TUTORING AND SUPPORT SERVICES • TRANSITION CAMPS • ACADEMIC AND LEADERSHIP SUMMER CAMPS • STUDY SKILLS CLASSES • DUAL ENROLLMENT COURSES • STANDARDIZED TEST PREPARATION & MUCH MORE

CONNECTING WITH COLLEGES

Students visited or heard from representatives at

40+
colleges and universities

"Going on college trips has made me think about my future and what I need to do to get there."

CHANGING CULTURES

More students than ever are taking the SATs for college admission

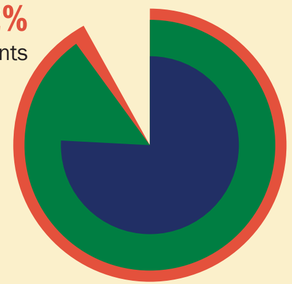
$:$$$$$

Eligible students can be matched up to $5 for every $1 they save for college with Individual Development Accounts

92% of parents

90% of students

76% of teachers



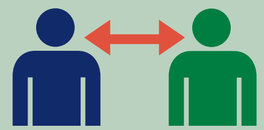
expect students to continue their education after high school

GEAR UP schools have a

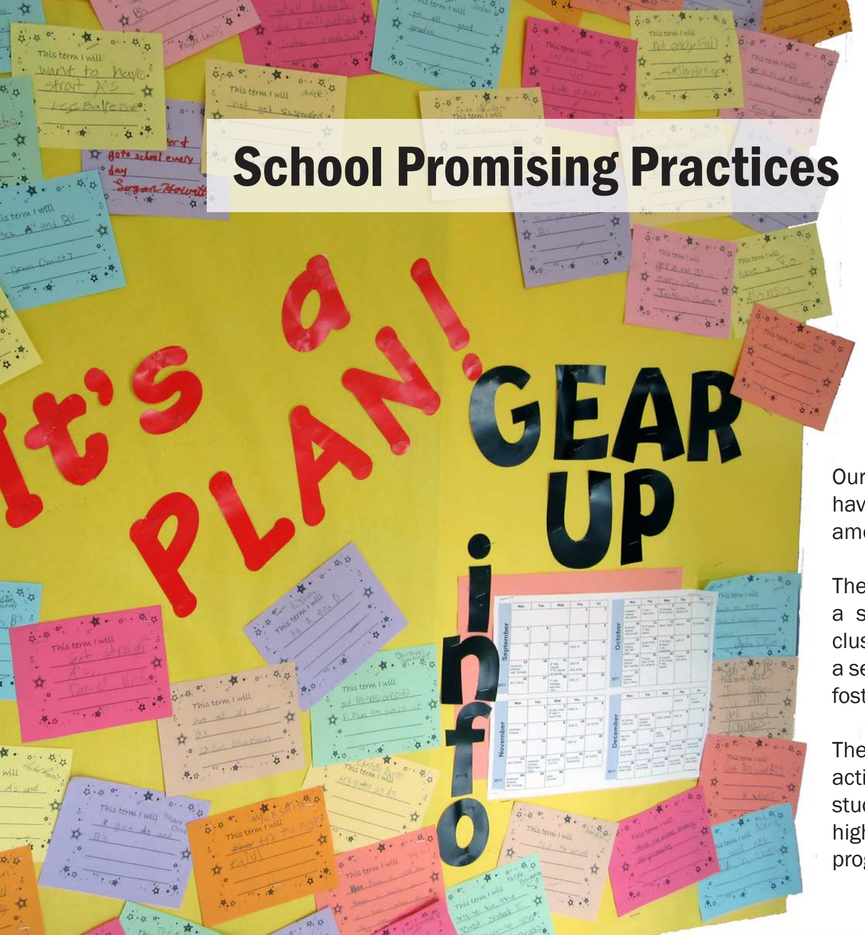
high school dropout rate than the state average

ENERGIZING EDUCATORS

600+
hours of professional development for teachers



Educators have a supportive network of consultants and practitioners for technical assistance, research questions, and more.



School Promising Practices

2008-2014 Cohort

Our 22 Oregon GEAR UP communities have all accomplished an incredible amount during 2011-2012.

These promising practices showcase a successful, unique activity that each cluster implemented this year, which gives a sense of the creative ways that GEAR UP fosters a college-going culture.

The 2008-2014 cohort began new activities for the original GEAR UP students, now in their sophomore year of high school, as well as continued notable programs for the other grades.

Aurora

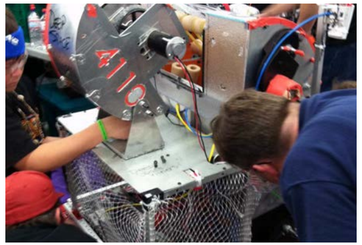
North Marion Middle School
North Marion High School

Students interacted with professionals from the community during a middle school Career Day and a high school College and Career Fair.

"Career Day was a big hit! We had three different types of engineers, a veterinarian, dentist, TV news reporter, author, musician, nurse, school counselor, teacher, fire fighters, police, corrections officer…In all, there were 25 careers represented!" said middle school GEAR UP coordinator Tracy Anderson.

Students received a personalized schedule to hear about careers related to their specific interests. Thus, students learned the relevance of a college degree for many different career fields.

Jerome Kersey, former Portland Trail Blazer, shared his career path with students.



Brookings

Azalea Middle School
Brookings-Harbor High School

Physics, computer science, mathematics, engineering, computer aided design and computer controlled manufacturing—these might seem out of reach for many high school students, but not for the juniors and seniors participating in the Robotics team.

FIRST® Robotics Competitions happen regionally nationwide, with teams of students guided by an adult coach. Students design, fabricate, test and program a 120-pound robot in just six weeks to accomplish various tasks.

School staff raved about the program. "The project based curriculum is rigorous, relevant and a realistic simulation of the world outside of high school—and develops skills that give students a world of options for the jobs that exist now and in the future."

Cottage Grove

Lincoln Middle School
Kennedy High School
Cottage Grove High School

Cottage Grove High School focused efforts on 75 juniors still needing to pass their OAKS writing tests, organizing an intensive Writing Workshop to strengthen particular skills.

The entire staff helped grade writing samples in preparation for the workshop, deciphering the key areas that students needed extra help. Teachers then spent half a day working with students on their own work samples. "[This] was important," said Kay Graham, principal of Cottage Grove High School, "because it gave credibility to the process."

The staff is now looking to provide similar workshops for reading and math, in order to ensure all students successfully gain the skills they need.

"I want to go to college, so I better get on the ball."

Glendale

Glendale Junior/Senior High School

Students were able to get an up-close look at professions that interested them during a full day job shadow experience in a field of their choice.

The school contracted with the Douglas Education Service District (ESD) to help implement the program, pairing every 8th and 10th grader with a professional in a broad range of careers without staff having to break a sweat.

“It is very valuable for the students,” said Jan Hubler, co-GEAR UP coordinator. “We will continue the program, as it’s now part of our graduation requirements.”

By the senior year, students at Glendale are expected to have performed 20+ hours of community service, participated in a job shadow and visited at least three colleges, and completed a senior project or portfolio and presentation.

Starting job shadowing in middle school allows students to experience multiple professions and recognize the importance of doing well in school before they begin their high school academic career.

Grants Pass

Fleming Middle School
North Valley High School

8th grade students from Fleming Middle School benefitted from a full year of mentoring and activities designed to ease their upcoming transition to high school. Each month, various clubs, sports, activities, and academic groups from North Valley High School presented opportunities to get involved, while building relationships as near-peer role models.

A no-cost program, it’s easy to both implement and sustain, and saw 100% participation for 8th grade students.

“The mentoring program helps create and strengthen the bridge between middle school and high school,” said Jerry Keeling, GEAR UP coordinator. “It promotes community and school spirit and an increased preparedness and enthusiasm toward transitioning to 9th grade.”

Irrigon

Irrigon Junior/Senior High School

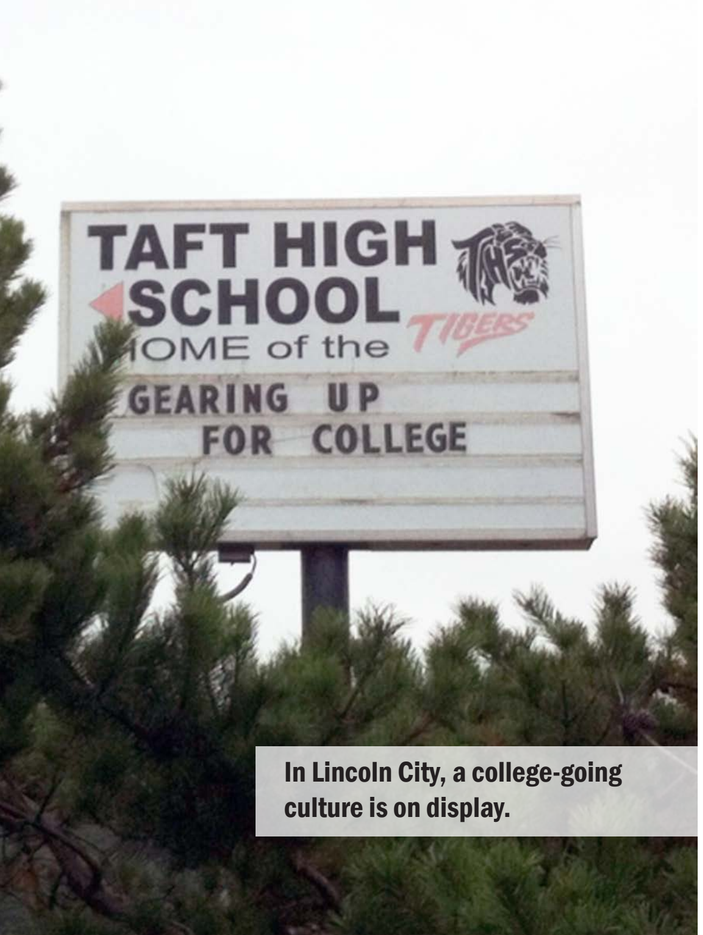
The My Story Project inspired 8th grade students to share their values and goals through written, visual and oral communication methods.

The My Story Project has four components: first, students write a college and career dream essay and take pictures that represent who they are now; then they create a poster including the essay and pictures; and finally they give a class and community presentation.

The school provided cameras and materials, and hosted a “Knight” (the school mascot) of Excellence that served as a forum for the presentations as well as a celebration of 8th grade graduation.

Adopted from a similar program created by the Chiloquin cluster in the first cohort of GEAR UP schools, the My Story Project encourages students to reflect on their past, present and future and the steps they should take in order to fulfill their dreams.

Students prepare to confront and break through their fears at the Student Leadership Event.



In Lincoln City, a college-going culture is on display.

La Pine

La Pine Middle School
La Pine High School

Five years ago, only 33% of high school students were meeting or exceeding the statewide math standard. Administrators changed the downward trend by instituting Math Labs for all freshman and sophomores as well as juniors that had not yet passed the state exam.

Adopted from a model at Forest Grove High School, the Math Lab provides a second daily dose of math instruction, in addition to the regular class. "The success is due in part to the dual reinforcement of mathematical content between the regular math class and the math lab. The students' determine the curriculum and program so it is tailored to their needs, not the teacher," said Vondell Fox, a Math Lab teacher.

In 2011-12, the percentage of juniors meeting or exceeding the math standard had jumped to 81%, clearly demonstrating the success of the program. Furthermore, the school culture has changed as well; once questioned, the Math Labs are now simply part of the way La Pine High School academically supports students.

Jay Mathisen, principal of La Pine High School, also credits the efficacy of the program to teachers' dedication. "The teacher needs to 'own the cause', they need to be excited about helping kids and make it their mission." Certainly, the staff at La Pine is doing just that, engaging students and seeing results.

Lincoln City

Taft 7-12 High School

School staff and administrators recognized the growing issue of homelessness for students and families in the district (around 20% of the student population), and worked in conjunction with community partners to offer an educative event and consider supportive actions.

The Homeless Summit brought local decision-makers together to understand the experience of homelessness through a simulation as well as look for local solutions and assistance. Sessions were led by Lynda Coates, a poverty consultant, and partners included the Lincoln County homeless liaison, the Chamber of Commerce, the Ministerial Association and the Rotary Club.

As a result of the Summit, organizations have held several outreach events for the homeless population of Lincoln County, providing multiple services in one location at one time. In addition, teachers and staff recognize the barriers that homeless students might face in succeeding in school and are equipped with stronger relationships with community organizations that can offer support.

Merrill

Lost River Junior/Senior High School

At Lost River, there is one big transition, from elementary to secondary school. With that in mind, staff offered two programs to ensure a positive academic and social transition. In the spring, 6th grade students went through an initial orientation preparing them for the move to the Junior/ Senior high school. At the start of the academic year, 7th and 8th graders had a day at the school to themselves, known as Raider Camp. This day of activities and information sessions focused on student success, positive school climate, building relationships with peers and staff, as well as practicing logistics like opening lockers and getting to class on time.

Starting junior high school with clear expectations has paid off. 7th and 8th grade students consistently had fewer discipline referrals and failing grades. In terms of state testing, 64% of the 7th grade met or exceeded in Reading and 81% in Math, the latter well above the state average.

Traci Reed, GEAR UP coordinator, further elaborated on the benefits. "Attendance is above 97% for this day and the relationships between staff and students have been a great reward."

"Going to college has been my dream, and gearing up for college is a good start!"

Myrtle Creek

Coffenberry Middle School
South Umpqua High School

The staff at Coffenberry Middle School used students' love for competition as the impetus for a series of contests around the 5 "Rs" (Rigor, Relevance, Right Classes, Relationships and Raising Awareness) that celebrated a college-going culture.

For example, students decorated their homerooms with posters, pennants and information from their chosen college that helped raise awareness about different types of colleges, price of attendance, minimum GPA requirements and more. Competition became fierce among the teachers, too, once it was announced that the winning classroom teacher would receive a half-day off.

Another contest called for students to write a one to three page essay on their definition of rigor, including personal experiences and goals. In this way, students reflected on the importance of strong academics as well as rehearsed writing college essays.

Overall, the contests helped set the tone of college readiness for the whole school, increasing student participation and creating teacher buy-in.

Stanfield

Stanfield Secondary School

Stanfield faces many of the same barriers as other GEAR UP communities including low levels of parental educational attainment. Thus, students may struggle with homework, without the benefit of a parent or guardian who is able to support their learning process.

The high school math teacher, Tyler Davis, recognized this and decided to experiment with the flipped class method, which allows students to watch online videos of the lecture at home and use class time to work collaboratively and with the guidance of the teacher.

Students are assessed at the end of each lesson and must show proficiency before they can continue. Students that need additional support can work with the teacher in small groups during class time or one-on-one during academic appointments, a tool used school-wide.

"Mr. Davis has refined the art of providing direction for learning through questioning strategies," said Stanfield principal Steve Ellis. "When students do the thinking, learning is so much deeper."

Thus far, the results are encouraging. Students are able to move at their own pace, with some students flying through the material with little coaching from the teacher, while others are able to re-watch the lessons multiple times and profit from increased teacher attention.

"GEAR UP has enabled us to do many activities with our kids we wouldn't have otherwise been able to do." GEAR UP Coordinator

Sweet Home

Sweet Home Junior High School
Sweet Home High School

Making Dreams Happen is Sweet Home School District's overall theme for changing the culture in the community to one where education is valued.

A college and career curriculum is embedded into the schedule starting at the 7th grade level with a mandatory elective class titled *Is College for Me?* 8th graders have the opportunity to follow that class with another elective, *College IS for Me!* The curriculum is continued throughout high school with a *Freshman Fortitude* class twice a month in English classes, followed by a one semester *GEAR UP for Success* class in the sophomore year. Finally, students work with ASPIRE mentors and a College/Career Counselor for final preparations to make their dreams for life after high school a reality.

Sweet Home High School celebrates students' acceptances into college, trade school, the military, and apprenticeship programs with Senior Signing Days held once a month, beginning in February of each year. Seniors must show proof of their acceptance at a particular postsecondary institution or other option before being allowed to participate.

During the signing ceremony, students' intentions are announced and they "sign" (autograph) their picture. All pictures are then hung up in the main hall of the high school for all students, parents and community members to see where the students are heading after graduation - a great way to showcase a college-going culture!

College acceptances are on display for students, parents and staff to see.

2011-2017 Cohort

Supported by The Ford Family Foundation, the 2011-2017 cohort began their first year of GEAR UP with enthusiasm and dedication.

Efforts were primarily concentrated on 7th graders, but many activities and services included high school students as well as teacher professional development.

Camas Valley

Camas Valley School

The highlight for Camas Valley was the GEAR UP class for all 7th graders that focused on raising awareness and general college knowledge as well as tips for academic success. "We covered many topics: study skills, I'm Going to College curriculum from NELA, Believing the College Dream curriculum from ECMC, computer skills, and the list could go on forever," raved GEAR UP coordinator Wendy Roque.

The class also went on six different college visits, often bringing along interested high school students as well. Stops included Umpqua Community College, Rogue Community College, Western Oregon University (with a stop at the Evergreen Air and Space Museum), Oregon State University, University of Oregon, and Southern Oregon University.

The impact and effectiveness of college visits was clear; pre- and post- surveys reflected a high percentage of increased knowledge of the reality of affordability and the relevance of a college degree as well as general information on class requirements and other admissions policies.

Coquille

Coquille Valley Middle School
Coquille Valley High School

Capitalizing on students' love of free food, the Pizza with a Professional series was an extremely popular program. Three times during the year, members of the community from a range of occupations shared their education and career journey during a free lunch available to all interested students.

Presenters were prompted beforehand to briefly discuss their career and education requirements as well as stress the importance of focusing on academics in middle and high school. Students had an opportunity to ask questions and learn about specific fields in-depth.

Community businesses and organizations were happy to participate and share their expertise, from a dentist to a photographer to representatives from the Bureau of Land Management. Thanks to willing presenters, low cost and general popularity, the program will be easily sustained and replicated with more occupations in future years.

"After high school, I will go to Oregon State University and study veterinary medicine. I've already been saving money for college!"

Drain

North Douglas Elementary School
North Douglas High School

Increasing rigor within the school curriculum was a main objective at North Douglas High School this year. The school greatly expanded the availability of dual enrollment classes that allowed participants to earn both high school and college credit.

Partnering with Umpqua Community College (UCC) and Yoncalla High School, eligible students could take Extended Options UCC courses - available online or on campus and taught by college staff - as well as College Now/Dual Credit courses offered at one of the high schools and taught by regular teachers.

44% of high school students now have at least one college credit, with one senior graduating with 32 credits from all of the dual enrollment classes taken over 4 years.

GEAR UP coordinator Janon Rogers remarked on the powerful motivation of the classes. “Upon learning that GEAR UP would pay the $25 fee for a course, one student has changed his attitude about school generally. He even got his hair cut, because he was a ‘college student’ now, and needed to look the part!”

Elkton

Elkton Charter School

Aspiring computer and video game designers got an inside look at a premiere college of computer interactive technologies with a visit to the DigiPen Institute of Technology in Redmond, WA.

Five high school students participated in an extensive tour of the campus, learning about their programs which include computer science, computer engineering, and art with an emphasis in creating video games.

“Students were much more aware of how much it costs to attend, the dedication required, and the classes they should be taking in high school,” said Lisa Olson, the school’s GEAR UP coordinator. “They all were surprised by the GPA required to get into this school.”

Myrtle Point

Myrtle Point Junior/Senior High School

Myrtle Point hosted a Career Fair in conjunction with the GEAR UP middle schools in Coquille and Powers, a shining example of collaboration and partnerships.

7th and 8th graders from all three schools listened to six different career presentations of their choice, learning about a typical workday, salary range, education and training required, and high school classes pertinent to the career.

Presenters included a radio announcer, representatives from the culinary arts, firefighters and paramedics, electricians and others. Students were prepared with questions after researching career pathways and their own interests using the Oregon Career Information System (CIS).

Myrtle Point also partnered with Roseburg High School in the fall, sending high school seniors to their College Fair in order to meet with admissions officers and learn more about higher education opportunities.

Port Orford/Langlois

Driftwood Elementary School
Pacific High School

Pirates were on the prowl at Driftwood Elementary School this year. The school mascot served as the namesake of a special class for 6th-8th grade students that focused on study skills and preparing for high school and college.

The Pirate Cruise class explored careers and had students build their middle and high school plans using Oregon Career Information System (CIS). As part of the required curriculum in the school, 100% of middle school students developed a program of study with the right classes they need to take in middle and high school in order to graduate from high school, matriculate into college, and enter their profession of choice.

In addition, students visited Willamette University in an effort to expose them to life on a college campus and the different opportunities available. After the visit, students reflected on what they had learned in their online portfolios.

As it is part of the regular schedule and curriculum, the program will continue every year with expanded campus visit options.

Students support their peers’ college aspirations at the Student Leadership Event at the University of Oregon.

The mentor program at Powers pairs 7th graders with high school students.

Powers

Powers High School

The GEAR UP mentor program was a powerful experience for both mentors and mentees. Three seniors and one sophomore from the high school were each paired with a small group of 7th grade students to serve as academic tutors and near-peer role models.

Mentors met with their groups once a week during lunch. Three weeks of every month the groups worked on school assignments, seeking support from each other and their mentor if needed. Lunch was provided the fourth week, with mentors leading their groups in games or other special activities.

"100% of our 7th graders participated in the mentor program," said Ellen Baldwin, GEAR UP coordinator and the supervisor of the mentor program. "In doing exit interviews, EVERY one of them listed it as one of the best parts of our GEAR UP program."

Reedsport

Reedsport Community Charter School

In Reedsport, learning doesn't stop when school lets out for the summer.

Before the end of the school year, 7th and 8th grade students select a book of their choice. At the end of June, the book is mailed to the student's house so s/he will be able to read it over the summer. The final piece of the Summer Reading Program is a book-related project in Language Arts class when students return in the fall.

Benefits of the Summer Reading Program include fostering an interest in reading for pleasure among students and increased reading comprehension levels. In fact, the number of 8th grade students who met or exceeded the standard on statewide reading tests increased by over 10%.

"GEAR UP is cool. I can't wait to go to college!"

Roseburg

John C Fremont Middle School
Joseph Lane Middle School
Roseburg High School

This year, the sole objective was to engage teachers across all three schools in Professional Learning Communities and professional development in order to align curriculum, enhance content knowledge, and increase pedagogical skills.

The language arts and mathematics departments from two middle schools and high school convened to engage in a review of the Common Core State Standards (CCSS) and alignment of content and resources across the grades. As part of this work, staff attended workshops together regarding the implementation of CCSS and the language arts team at the middle school level developed common writing prompts for all students and scored them collaboratively.

Further work on curriculum alignment will continue in future years by utilizing early release time.

Yoncalla

Yoncalla Elementary School
Yoncalla High School

Students in 7th and 8th grades studied strategies to be successful in school as well as investigating postsecondary options during an Eagle Exploration class, which included a week of college visitations and job shadows.

Designed to make the move to the high school seamless, topics included class and time schedules, moving from class to class, getting organized, getting good grades from the start, and how high school is different from middle school.

Every middle school student created a 6-year plan with their goals for high school and beyond, which was evaluated during a student-led parent conference in the spring. 100% of parents attended these conferences, which were designed to help the student and parents understand how the student's life is going to change and how to help them transition smoothly.

Thanks to the activities of the Eagle Exploration class, 90% of 7th and 8th graders attended a career fair, visited a college campus and/or participated in a job shadow.

GEAR UP Statewide Activities

2011-12 was a busy year! Statewide events, activities, and programs engaged students, parents, teachers, and the community.

GEAR UP thrives in large part due to our partnerships with universities, programs, and organizations that provide professional development, campus programs for students and funding for low-income students and school staff across the state. In 2011-2012 we instigated, continued and expanded many collaborations across the state.

By the numbers...

15

Oregon GEAR UP students met Rep. Chaka Fattah at the GEAR UP West conference in October

760+

students learned information on the relevance of a college degree at the Career Photo Booth

1,116

students, parents, school alumni and community members participated in the National GEAR UP Week Facebook contest

PROGRAM PARTNERS

Access to Student Assistance Programs In Reach of Everyone (ASPIRE)

Camp Odyssey & Oregon Solutions

Community and Shelter Assistance Corp. (CASA)

Education Northwest (formerly NWREL)

Education Partnerships, Inc. (EPI)

Educational Credit Management Corporation (ECMC)

Envictus Corporation

Gear Up for Excellence

Klamath Community College

NeighborWorks® Umpqua

NELA® Center for Student Success

Oregon Career Information System

Oregon College Access Network

Oregon Community Foundation

Oregon Small Schools Network

Oregon State University Precollege Programs

Oregon Student Access Commission (OSAC)

Path to Scholarships®

Southern Oregon University Precollege Programs

Student Paths

The Ford Family Foundation

I'm Going to College

Partner: Northwest Education Loan Association (NELA)

The NELA® Centers for Student Success℠ designed the I'm Going to College program for elementary and middle school students to create awareness of higher education and instill in students the idea that going to college is an attainable goal.

GEAR UP received a grant from NELA for the program that covered teacher guides, student workbooks and backpacks for the 8-lesson curriculum, as well as funds for transportation to a college and lunch on campus during the visit. A total of 486 seventh grade students from eight clusters participated in the program, visiting colleges and universities across Oregon.

Student Paths College & Career Curriculum

Partner: Student Paths

Three schools opted to use Student Paths curriculum with high school students which includes peer-to-peer publications about college, career and life readiness.

Summer Leadership & Academic Enrichment Activities

In addition to on-campus programs sponsored by GEAR UP (see next page), funds were available for schools to send students to other summer programs and camps, as well as bolster learning opportunities in their communities.

12 schools received support for students to attend:

- Enhanced Campus, summer remediation plus courses at Oregon Coast Community College
- Sea Camp of Oregon at Southern Oregon University
- OASC Summer Leadership Camp at Western Oregon University
- Forensic Science Camp at Oregon State University
- MedStars at Oregon Health & Science University
- & many other activities!

Individual Development Accounts

Partner: Community and Shelter Assistance Corp. (CASA); NeighborWorks® Umpqua

We continued our partnership with two community development organizations to offer income-eligible students a matched college savings account, also known as Individual Development Accounts (IDAs). Schools assisted students and families in the enrollment process, giving them the tools to begin investing in their future. Every dollar a student saves in their IDA is matched up to 5:1.

To date, 181 students have enrolled in the program and benefitted from money management workshops and other learning opportunities.

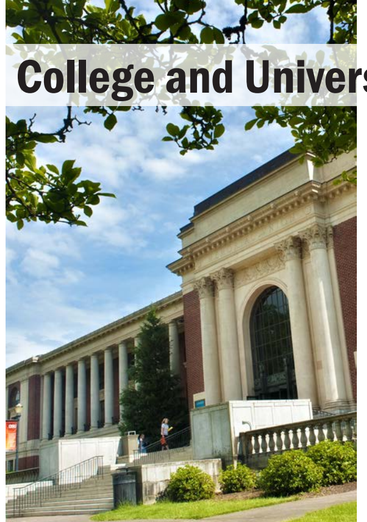
Camp Odyssey

Partner: Oregon Solutions

GEAR UP high school students were invited to attend a revived summer program, Camp Odyssey, which examines the dynamics of oppression and privilege and transforms young people into becoming social investors and emerging leaders in their communities.

Student Programs

College and University Partnerships



GEAR UP builds bridges between K-12 schools and postsecondary institutions through field trips and summer programs on college campuses. Participants interact with college student guides and faculty members, explore career options, and become familiar with the resources available on campus.

In 2011-2012, over 5,000 students benefitted from a college campus experience. Campus representatives also visited schools as part of college and career fairs to meet with students and parents.

Natural Resources Leadership Camp

Partner: Oregon State University's Office of Precollege Programs

Over 80 middle and high school students from 19 GEAR UP schools learned about natural resources careers and gained leadership skills while at OSU.

Students met professionals in a variety of fields including fisheries and wildlife, zoology, forestry, and soil and water conservationists. Hands-on activities included a service project pulling invasive species at the William L. Finley National Wildlife Refuge. Accompanying teachers also benefitted from professional development.

College students served as mentors and group leaders, leading students in college readiness programming. Highlights included a morning at the Challenge Course, where students developed their teamwork and problem-solving skills, as well as capstone presentations on advice for their peers and younger students on how to succeed in high school and prepare for college. *For more photos and videos, visit www.facebook.com/oregongearup.*

Camp M.D.

Partner: Southern Oregon University Precollege Programs

Future nurses, doctors, and dentists spent a week at Southern Oregon University learning about careers and majors in the medical field. 16 high school students raved about their experiences in the medical forensic lab, touring Mercy Flights, and participating in Oregon Health and Science University's nursing lab simulations. "I loved every second of Camp M.D.," said one participant.

Carol Jensen, the director of Pre-College Youth Programs at SOU added, "The highlight of the program for the students seemed to be the individual job shadows that were arranged with physicians throughout the Rogue Valley." Students were able to observe doctors in a wide array of medical specialties including Hematology, Oncology, Endocrinology, Cardiology, Internal Medicine, Pediatrics, Infectious Disease and more.

One student summed up her experience, "I came only wanting one career and now I see a few I could do in the medical field."

Student Leadership Event

Partner: Gear Up for Excellence

200 middle and high school students and chaperones from nine GEAR UP clusters descended on the University of Oregon for three days of activities focused on leadership, academic success, and personal growth led by a team from Gear Up for Excellence. Held annually each August, students worked in small and large groups with college student mentors on problem-solving and teamwork challenges that apply to real-life situations.

This year, high school students who had gone through the program before had the opportunity to take their leadership skills to the next level, working on communication tactics, goal-setting, and overcoming fears.

Kristen Peterson, a senior at Sweet Home High School, said, "[The] camp was so amazing. I met some great people and learned quite a bit for my future."

To see photos and videos of the Student Leadership Event, visit www.facebook.com/oregongearup.

"[The OSU Natural Resources Leadership Camp] was a fun camp. I was able to meet new people and learn new things."
Dariyan Woodard, Elkton Charter School

Star Students

Student of the Month

Oregon GEAR UP recognizes one student a month who has demonstrated determination, leadership, teamwork, or overcome adversity and is on track for college success. Teachers and administrators nominate outstanding students, like Shantell Goodwin (left), who was very involved in the community and at Brookings-Harbor High School and will be attending Oregon Institute of Technology in the fall.

Other students recognized:

Sierra Burgess
Glendale Junior/Senior High School

Kenya Hampton
Yoncalla High School

Newton Allred
Powers High School

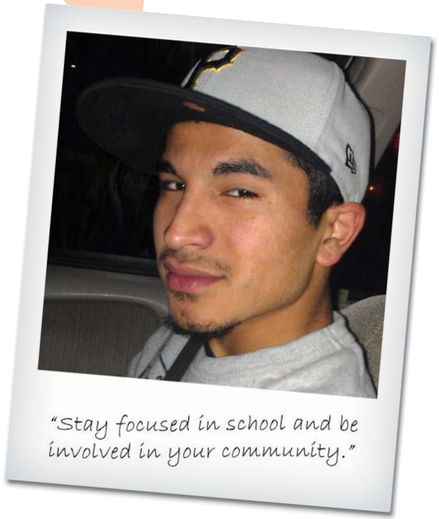
Kerston Weekly
Myrtle Point Junior High School

National Youth Congress

BillyAnn Stempel and Alexa Taunton, students at Taft 7-12 School in Lincoln City, and Louden Oleachea and Colton Mullings, students from La Pine Middle and High School, respectively, were selected to represent Oregon at the National Youth Congress in Washington D.C. during the National GEAR UP Conference. They learned leadership and communication skills that will be brought back to their schools to further a college-going culture and an active, engaged student body.

Success Stories

Pedro Arenas (right) is a graduate of McMinnville High School and attends Oregon State University where he is studying to be a high school history teacher. He is just one of several *Success Stories* from the first cohort of GEAR UP schools (2002-2008) featured on our website and Facebook page.



Professional Development

Oregon GEAR UP continued to provide teachers and administrators with a broad range of professional development opportunities. GEAR UP coordinators and administrators attended the regional conference, GEAR UP West, in Portland, OR and the national NCCEP/GEAR UP Conference in Washington D.C. to present and learn promising practices from across the country. In addition, school teams were able to discuss ideas, brainstorm initiatives, and plan programs during statewide meetings.

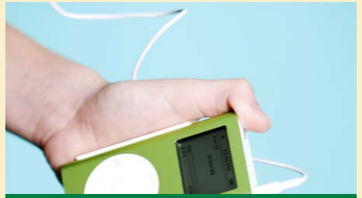
SUCCESS Retreat

Partner: Education Northwest

The three-day retreat for Supporting Unique Community Coalitions Engaged in Student Success (SUCCESS) is one of the most valuable and compelling professional development opportunities for GEAR UP clusters.

Schools were encouraged to bring a diverse team of constituents including coordinators, teachers, parents, administrators and even students to learn from regional experts on *Engaging Student, Parents and the Community*, this year's theme.

In addition, teams had uninterrupted time to generate an outline for GEAR UP programs and services at their school in the year ahead, as well as share highlights and promising practices with other schools.



Principals' Leadership Program

Partner: Education Partnerships, Inc. (EPI)

GEAR UP school leaders benefit from the expertise of EPI consultants and each other in the Principals' Leadership Program, now in its third year. School principals receive a personal education mentor, access to current research on school trends, workshops, and networking opportunities.

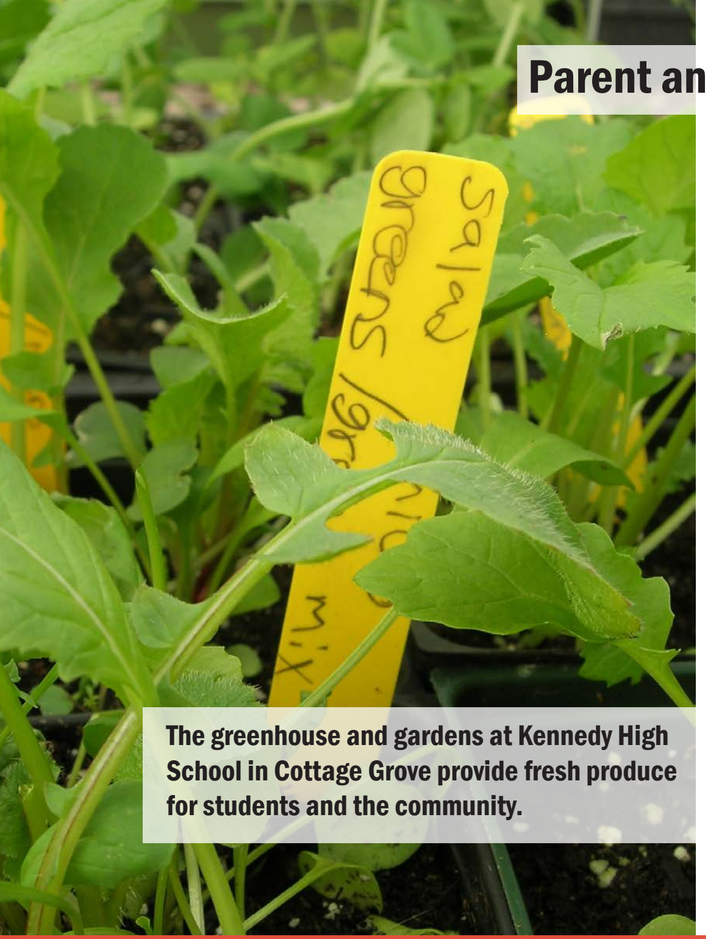
In addition to receiving research briefs on participant-generated topics, principals shared their own best practices in *Principal Perspectives*, a podcast series available on the GEAR UP website and iTunes.

Rural Schools Network (RSN) for College Access

Partner: Regional Educational Laboratory (REL) at Education Northwest

With federal funding from the Institute of Education Sciences (IES) over the next five years, REL Northwest began work with Oregon GEAR UP schools in a research alliance to support the use of existing state and local data to answer important questions about preparing low-income, rural students to succeed in postsecondary education.

School administrators and staff will benefit from customizable and user-friendly data on what works in college readiness programs as well as workshops and forums that disseminate research findings.



The greenhouse and gardens at Kennedy High School in Cottage Grove provide fresh produce for students and the community.

Parent and Community Engagement

Parent Newsletter

Recognizing the critical need to engage parents with information about postsecondary education and steps for college preparation, we offered schools the *GEAR UP Gazette*, a customizable quarterly parent newsletter with timely information about financial aid, summer opportunities and more. Schools added their own events and important reminders and distributed the newsletter either electronically or in paper form.

Community Conversations

Partners: Oregon Community Foundation; Everyday Democracy

Several schools took advantage of funds from the Oregon Community Foundation to begin the process of engaging their communities in dialogue regarding education and broader city goals, with some using the framework and technical assistance provided by Everyday Democracy.

Community Engagement Specialist

Partner: Becky Wilson

Building upon previous work mapping community assets in GEAR UP communities, Becky Wilson joined the team to help schools implement best practices engaging parents, businesses, philanthropic organizations and other local stakeholders. The GEAR UP coordinator at Chiloquin from 2002-2008, Becky brings on-the-ground experience and will continue her work looking toward sustainability for college readiness programming at the schools.

Communications & GEAR UP In the News

Education Week Teacher, 4.18.2012,
by Liana Heitin
Flattening the School Walls

[Principal Tom] Horn's leadership style—and his emphasis on beyond-the-classroom learning—appears to be working. The attendance rate at the 100-student high school, formerly called Al Kennedy Alternative School but now referred to by students and staff as the Kennedy School of Sustainability, has jumped from 23 percent in the fall of 2006, when Horn took over, to a current rate of about 90 percent. The dropout rate is now at 12.5 percent, down from 20 percent in 2004-05. Test scores, though still below par, are on the rise. And for the first time ever, students from Kennedy are going to college.

Curry Coastal Pilot, 4.18.12, by Lorna Rodriguez
Students get serious about education

Students at Brookings-Harbor High School learned all about postsecondary options – financial aid, scholarships, the college application process, what students need to do to be competitive and how to save for college – this past week.

The sessions were led by BHHS staff, former students, and community members. "Everything was based on gearing students and families up for postsecondary education," [teacher and counselor Kristi] Fulton said. "Really, what the night is all about is to start planning. College is not a dream, it's a plan. We want students to be prepared, and pursue some sort of secondary training. It doesn't end when you're a senior."

News-Review, 5.1.2012,
by Inka Bajandas
Douglas County schools work to increase college enrollment

Douglas County school administrators say they're working hard to encourage more students to go to college. "It was clear the biggest difference we could make in our students lives was to focus on what was going to happen after high school," South Umpqua High Principal Kristi McGree said.

At South Umpqua High School, seniors [Alayna] Budel and [Bryce] Walter said taking the GEAR UP course makes them feel poised for the transition from high school to college. Budel said she hopes to study at OSU for the medical field. She recently found out she made the cheer leading squad. Walter plans to attend a community college to study dental hygiene. She said she's spent a lot of time in the GEAR UP classes applying for schools and scholarships. "I got mostly everything done in here," she said.

Visit our redesigned website
gearup.ous.edu
with resources for teachers, students and parents.

Social Media

From Facebook to YouTube, Twitter to Pinterest, Oregon GEAR UP delivered college readiness information to students, teachers, elected officials, community members and any other interested stakeholders. Follow, friend, subscribe or just generally join in!

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Creating a college-going culture early...

...with high expectations for all students.

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