

Chair's Plan for State Financial Aid Work Group  
(Oregon Opportunity Grant)

**Charge**

Oregon Education Investment Board directives:

1. Is state financial aid as it is currently structured adequately prepared to propel us to 40-40-20?
2. Is there a different allocation methodology that would promote the ability of under-represented students to access state financial aid?
3. Should state financial aid be redesigned to influence or reward success and completion?
4. What should be the relationship between state and institutional financial aid?
5. What data and data collection mechanisms are necessary in order to adequately track and report progress toward degrees over time?
6. How should state financial aid be redesigned in light of the bonding possibilities that would be made available if voters pass the legislative referral of SJR 1 (the Oregon Opportunity Initiative)?

Additional questions related to:

7. Review the Oregon Opportunity Grant and its shared responsibility model.
  - a. Do the elements of the shared responsibility model accurately reflect the true cost of attendance at eligible post-secondary institutions? If not, what changes are needed to create an accurate measure of cost of attendance?
  - b. Are the assumptions of student and family support in the shared responsibility model reflective of ability to pay? If not, what changes are needed to better reflect ability to pay?
  - c. Since its overhaul in 2007, has the OOG shown demonstrable improvement in access and completion for its recipients?
  - d. How many eligible students are unable to receive aid at current funding levels?
  - e. Can the intent of the shared responsibility model be maintained at current funding levels?
  - f. How much additional funding (state and/or institutional) would be needed to fully fund the shared responsibility model in future years?

Referred by Higher Education Coordinating Commission:

8. Should Oregon students enrolled in Western Governors University be eligible for financial aid via the Oregon Opportunity Grant.

### ***Membership***

Larry Roper (HECC), Chair

Rob Fullmer (HECC)

Anayeli Jimenez (HECC)

Melody Rose, Interim Chancellor, Oregon University System

Gerald Hamilton, Interim Commissioner of Community Colleges and Workforce Development

Gary Weeks, Oregon Student Access Commission

Mike Selvaggio, Office of the Treasurer

Randy Choy, Oregon Community Foundation

Larry Large, Oregon Alliance of Independent Colleges and Universities

Eric Noll, Board Chair, Oregon Student Association

### ***Resource Persons***

Bob Brew, Executive Director, Oregon Student Access Commission

Kathy Campbell, Dean of Financial Aid, Chemeketa CC

Kate Peterson, Assistant Provost, Enrollment Management, OSU

Karen Marrongelle, Interim Vice Chancellor, Academic Strategies, OUS

Joe Holliday, Assistant Vice Chancellor for Student Success Initiatives, OUS

Endi Hartigan, Office of the Chancellor, will serve as executive assistant to the work group

### ***Timeline***

Work Group to begin meeting in October 2013 and conclude by March 2014.

First report to HECC on work plan and potential additional questions to be addressed by Nov. 18, 2013

Interim report to the OEIB and the Legislature in February, 2014.

Final report to the OEIB by March 31, 2014