

HIGHER EDUCATION IN OREGON: OVERVIEW



February 2015

OREGON'S 40-40-20 GOAL

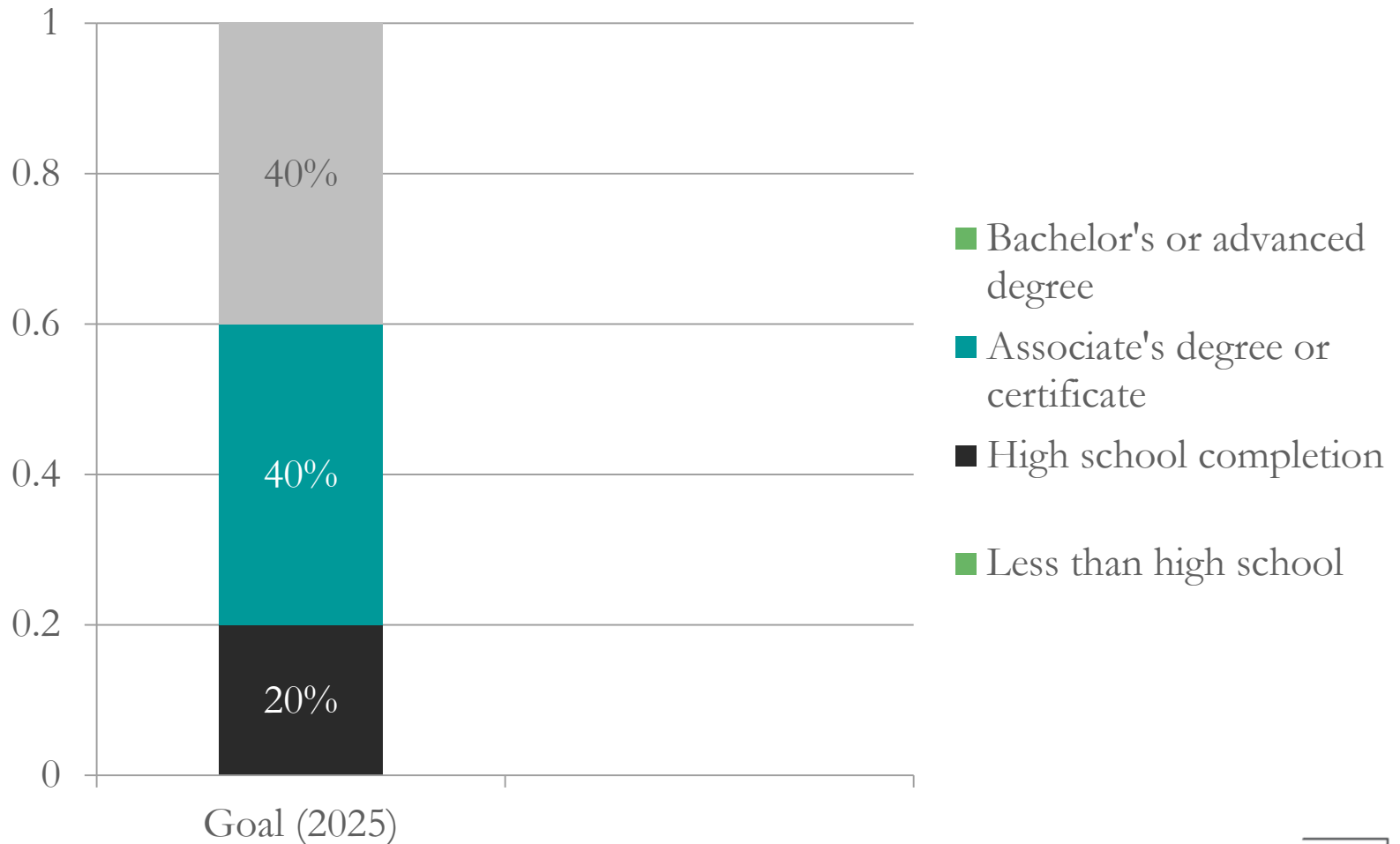
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By 2025, 40% of adult Oregonians will hold a bachelor's or advanced degree, 40% will have an associate's degree or a meaningful postsecondary certificate, and all adult Oregonians will hold a high school diploma.



MEASURING OREGON AGAINST 40-40-20

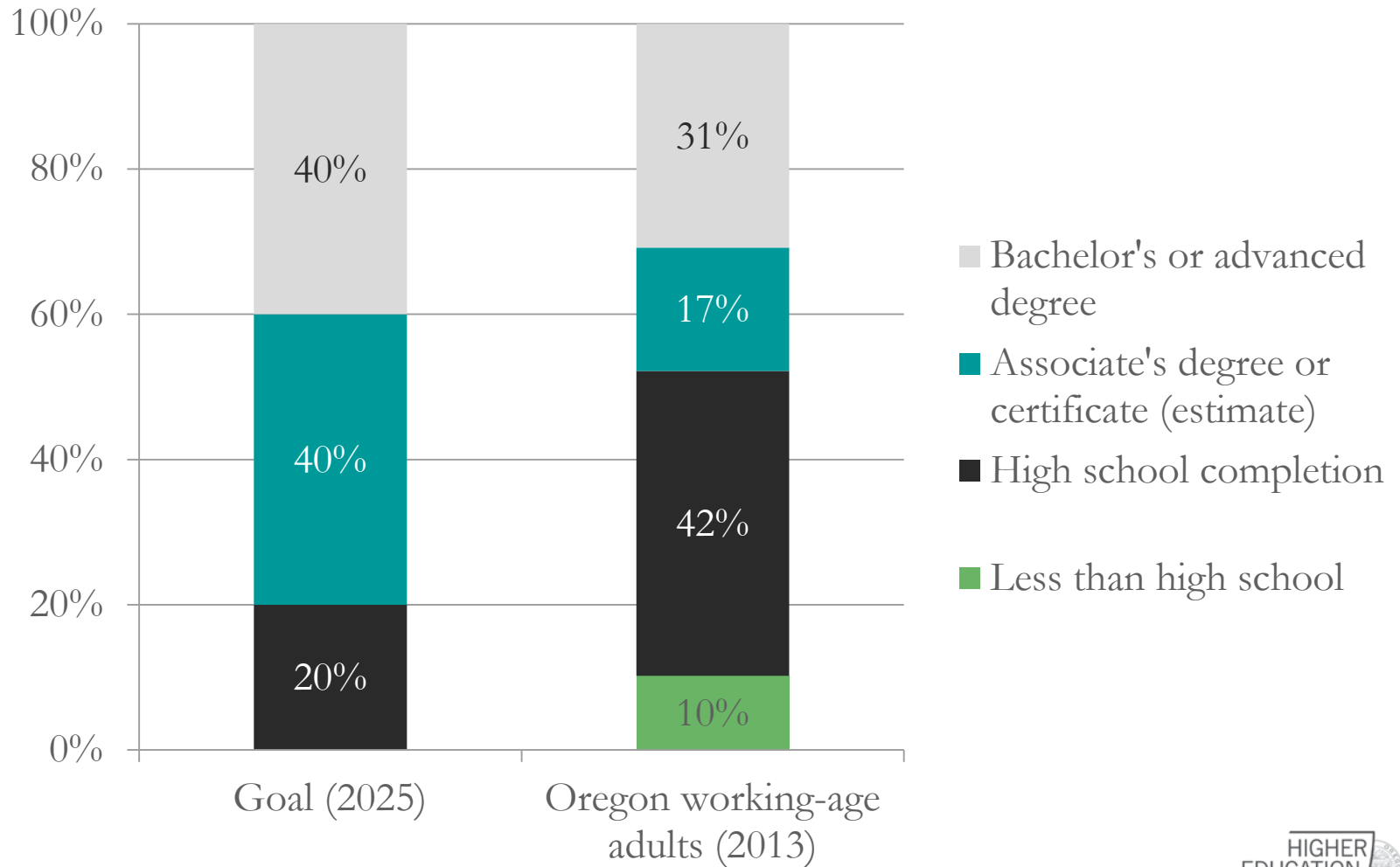
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Source: HECC analysis of the American Community Survey

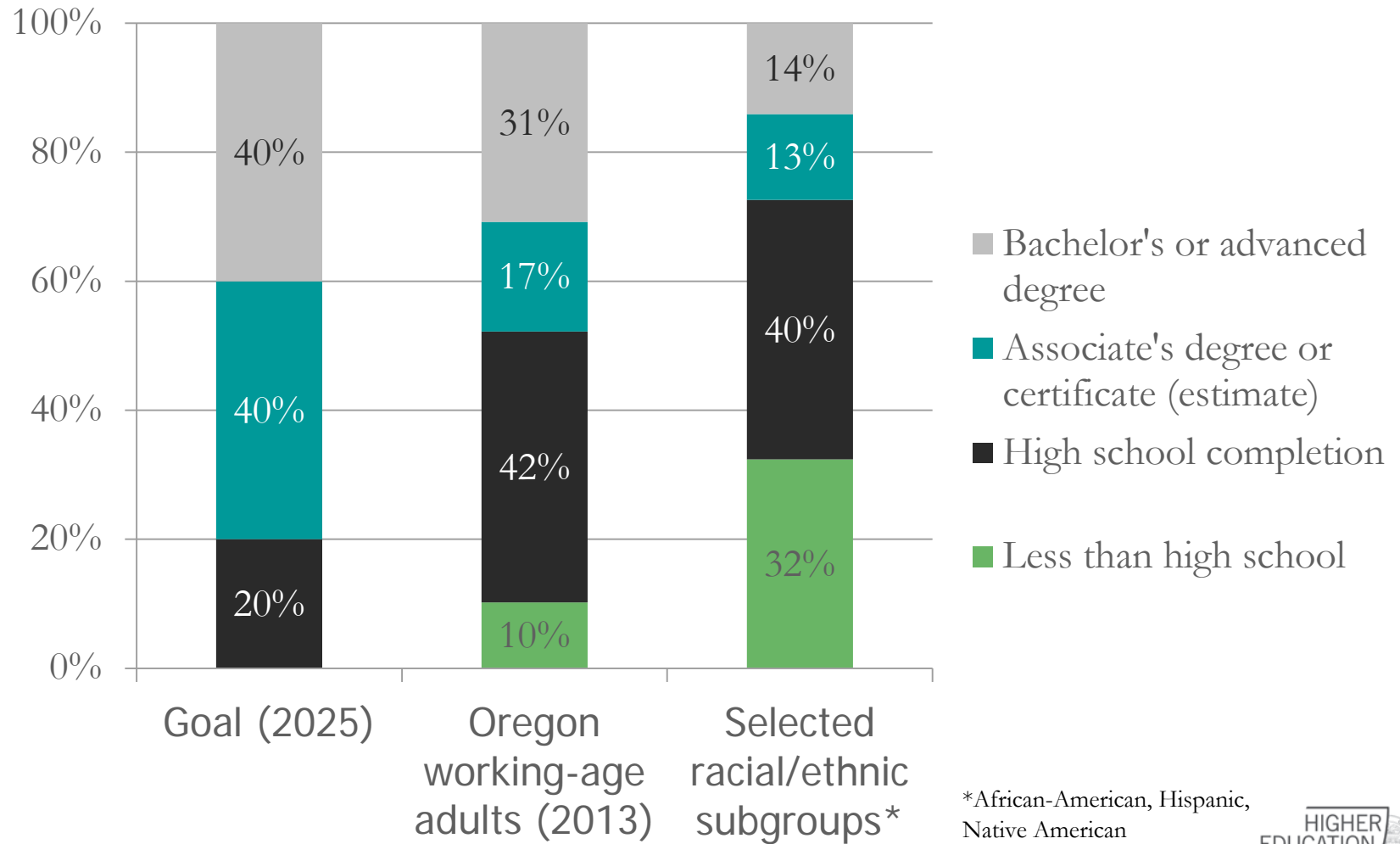
MEASURING OREGON AGAINST 40-40-20

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Source: HECC analysis of the American Community Survey

MEASURING OREGON AGAINST 40-40-20



*African-American, Hispanic, Native American



40-40-20: "ALL ADULTS"? THE "PIPELINE"?

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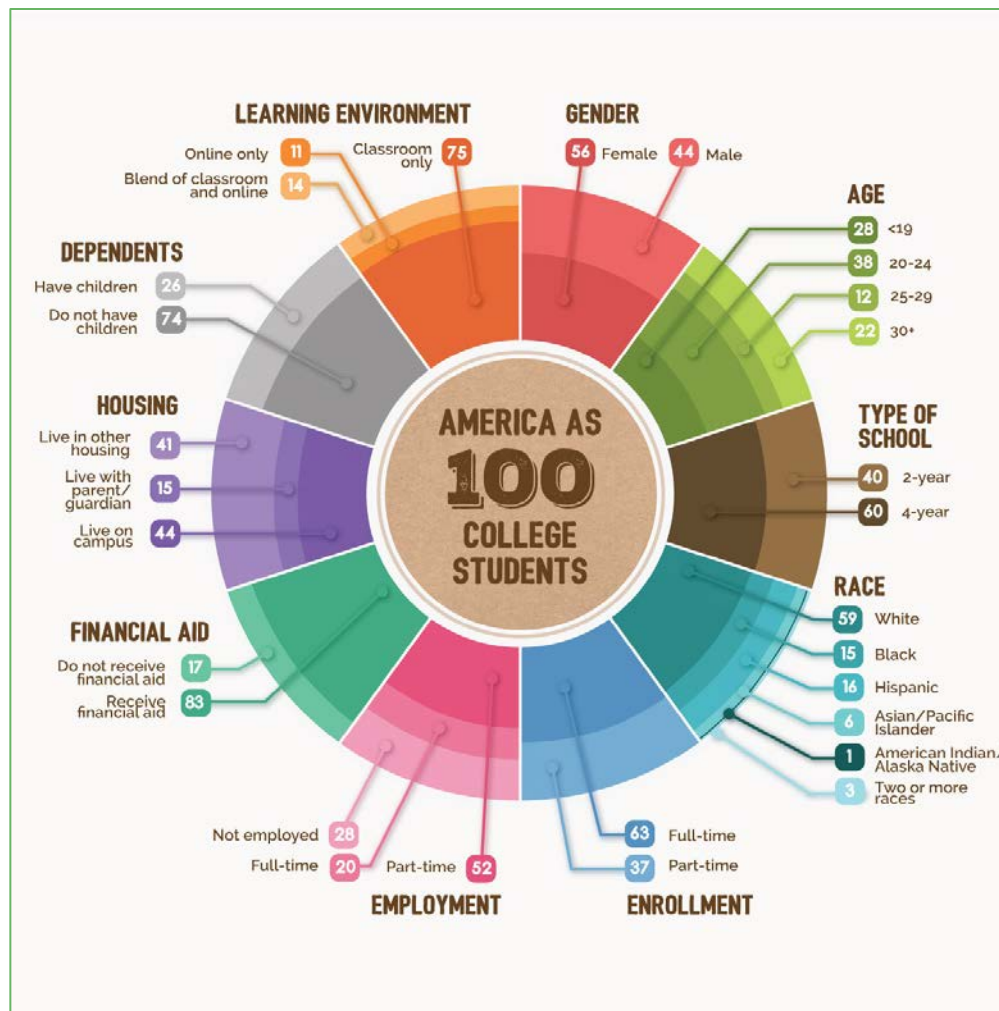
- As a pipeline goal, applying to the expected high school class of 2025 (and beyond).
- As a goal for the adult population, applying to working-age adults in 2025 (and beyond).
- The latter goal should be continually refined based on actual labor market needs and valuable certificates, and may not be 40-40.

40-40-20: THE MIDDLE 40

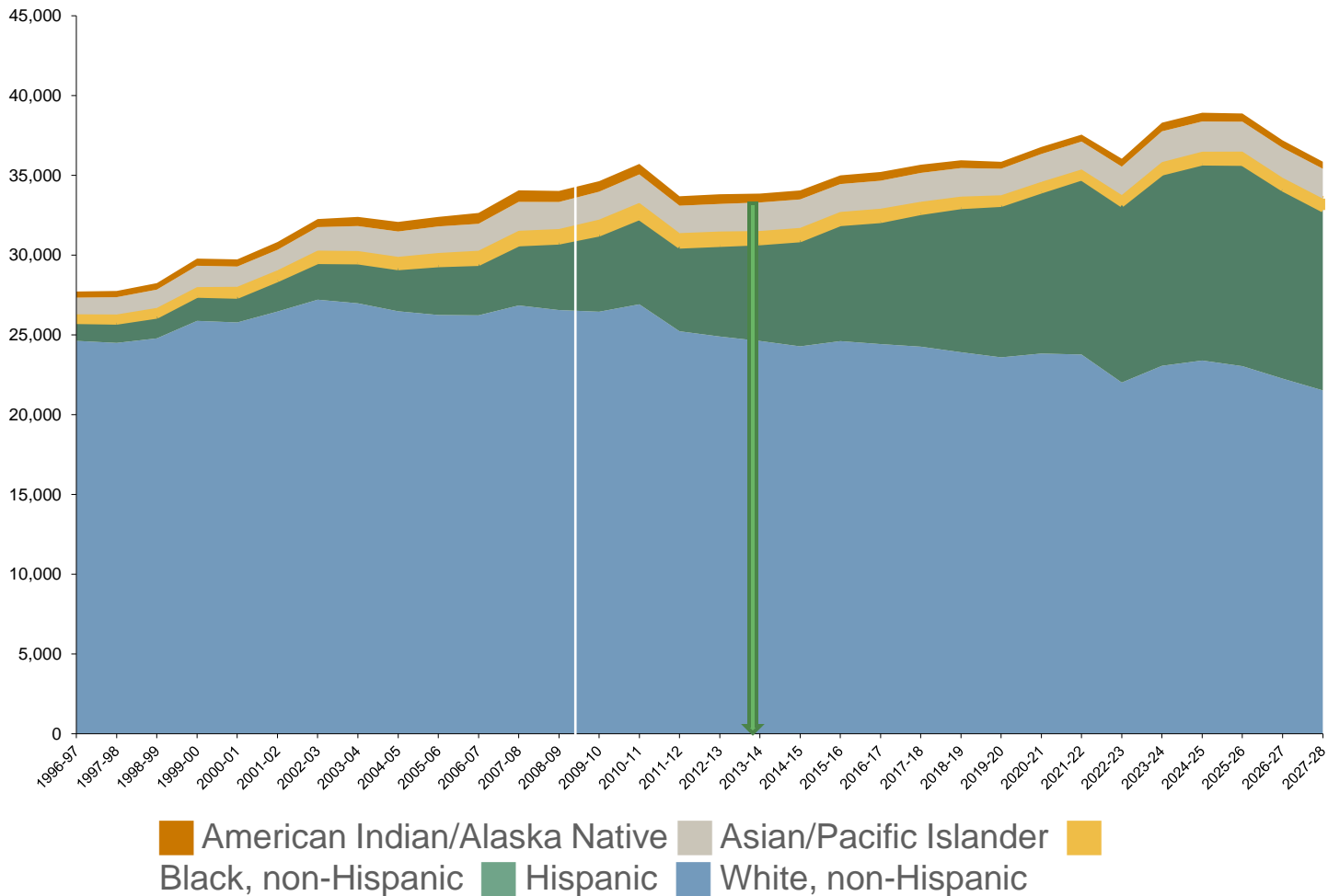
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- We endorse a broad understanding what “counts” for the middle 40, including:
 - two year associates’ degrees,
 - one-year certificates,
 - registered apprenticeships, and
 - Career pathways certificates
 - Other credentials should include
 - industry-based nationally-recognized certificates and
 - state licensure for various fields.

AMERICA AS 100 COLLEGE STUDENTS



OREGON PUBLIC HIGH SCHOOL GRADUATES BY RACE/ETHNICITY, 1996-97 TO 2008-09 (ACTUAL), 2009-10 TO 2027-28 (PROJECTED)



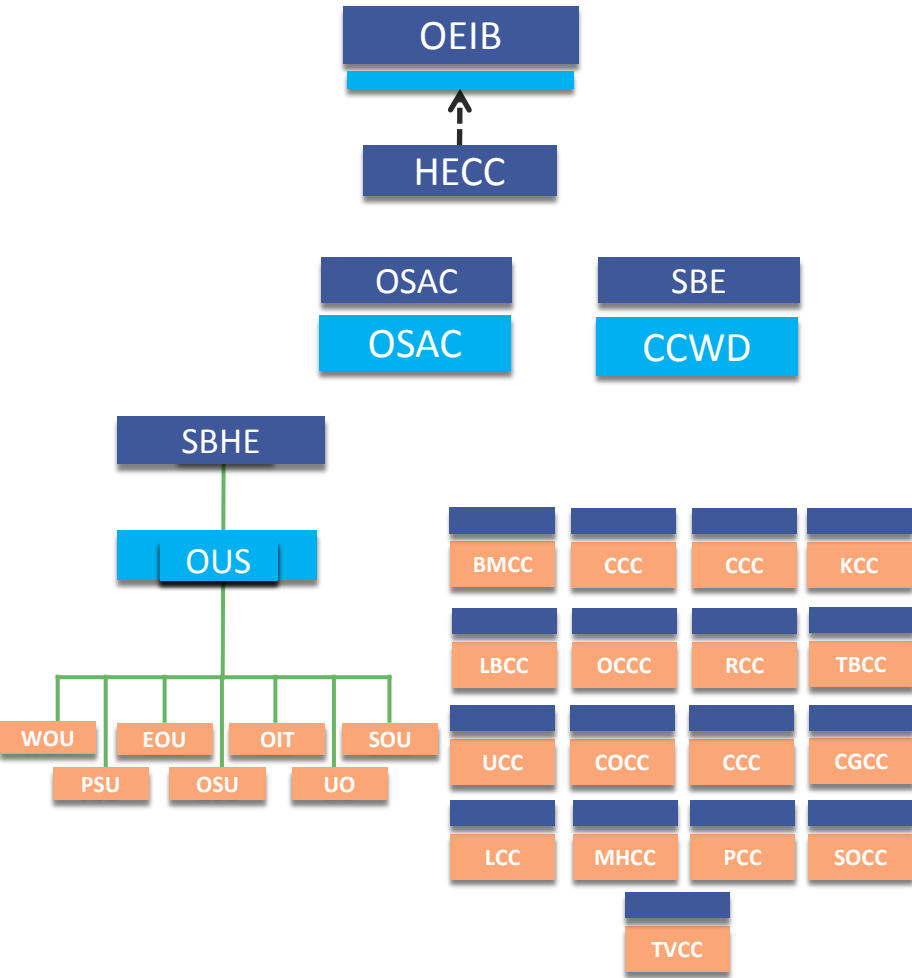
Source: Western Interstate Commission on Higher Education (WICHE)



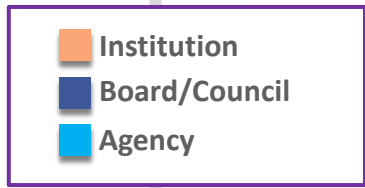
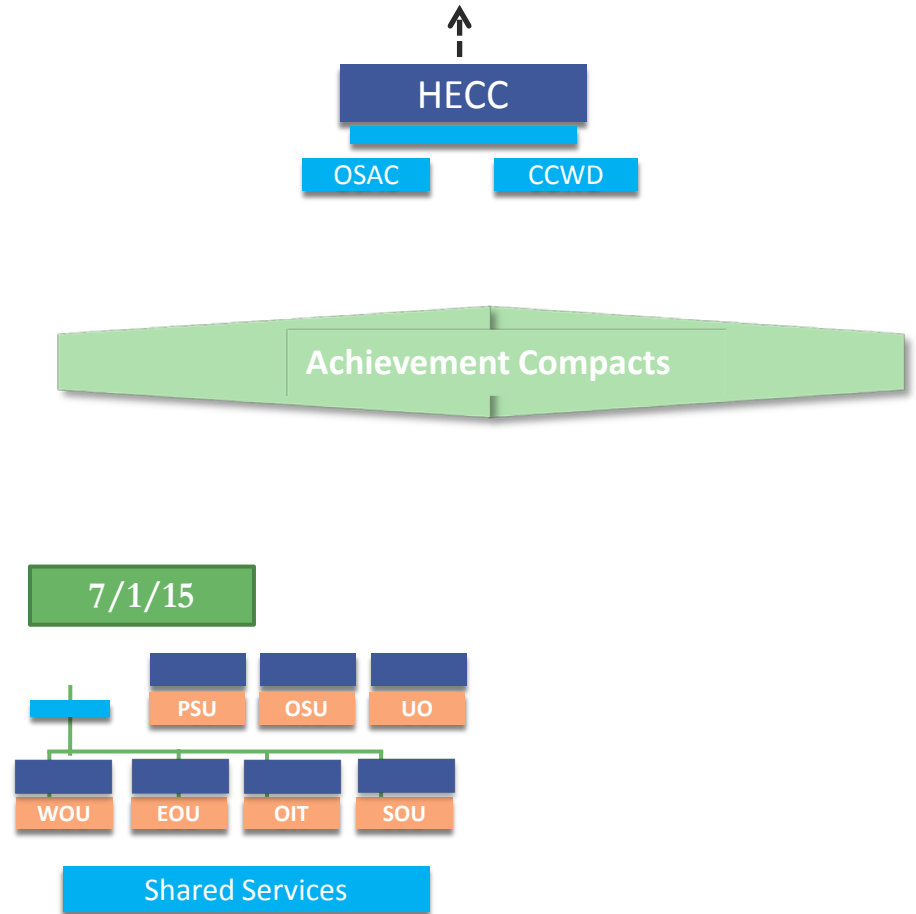
OREGON HIGHER EDUCATION INSTITUTIONS

| Institution type | Subtype | Number of institutions | HECC responsibilities |
|--|--|------------------------|---|
| Oregon public universities | -- | 7 | Funding allocations, state budget development, program approvals, mission approvals, coordination |
| Oregon Health and Sciences University | -- | 1 | Coordination |
| Oregon community colleges | -- | 17 | Funding allocations, state budget development, program approvals, coordination |
| Oregon-based private, degree-granting schools | State-regulated | 30 | Degree authorization, coordination |
| | Exempt from state regulation due to religious or accreditation status | 62 | Coordination |
| Non-Oregon degree-granting schools (distance education) | State-regulated | 82 | Degree authorization, coordination |
| | Exempt from state regulation due to religious status and/or lack of "physical presence" triggers | 144 | Coordination |
| Oregon private career schools (non-degree granting) | -- | 220 | Licensure, teacher registry, coordination |

Postsecondary Before 2013



Postsecondary Post 2013



LOCAL AUTONOMY

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- ✓ Existing Institutional Boards Maintained At Community Colleges
- ✓ New Institutional Boards Created at Public Universities
- ✓ Charters to Protect Public Mission

STREAMLINED STATE SUPPORT

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- ✓ From Four Boards to One
- ✓ Clarity of Roles
- ✓ Single Post-Secondary Agency
- ✓ Free up Resources for Teaching and Learning

COORDINATION AND CONNECTIONS

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- HECC is responsible for CCs, Universities, Financial Aid, and Consumer Protection (privates)
- Grades “11-14” Connected via work with OEIB

WHAT IS THE STATE INVESTMENT?

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2013-15



2015-17 GRB

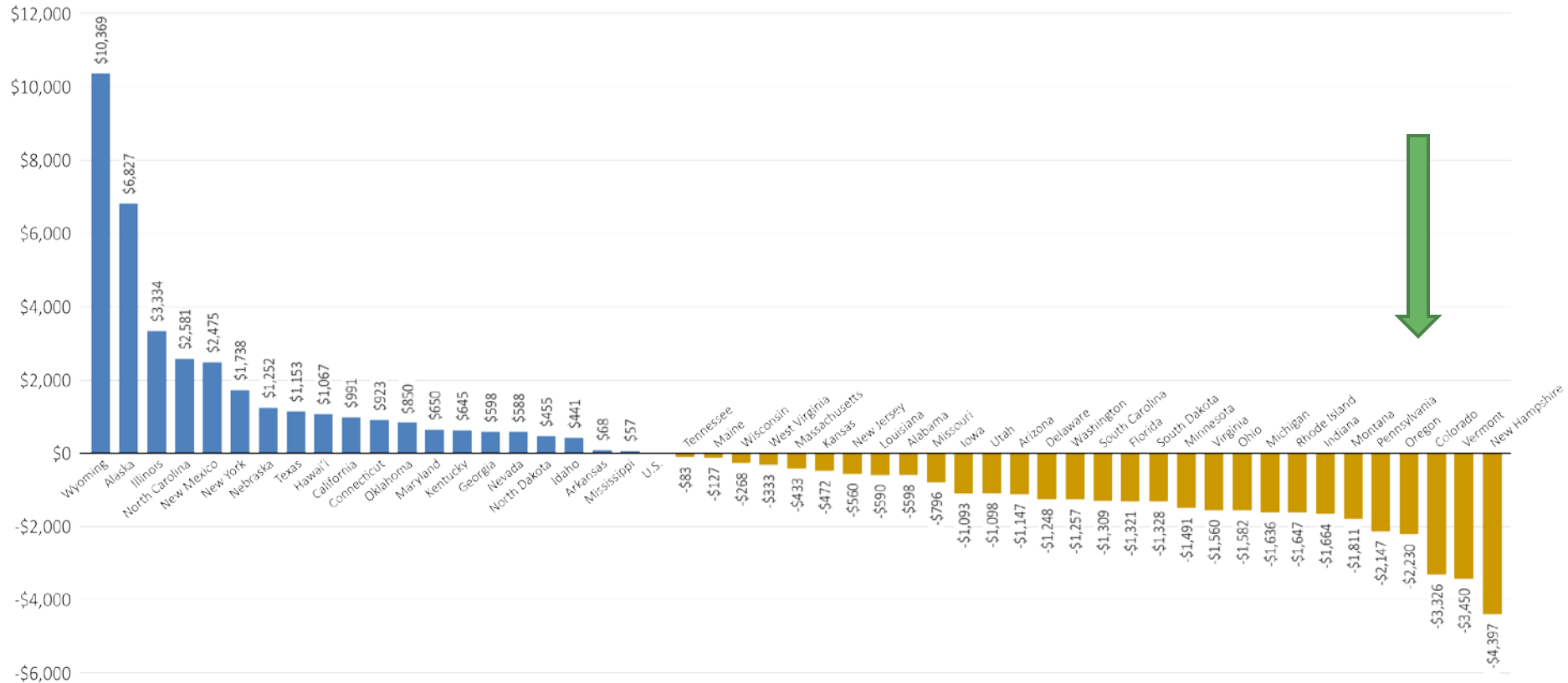


All figures are General and Lottery Fund, in millions

*HECC GRB also includes new investments in Youth Employment (\$15m), Worker training (\$6m), and a Community Innovation Fund (\$25m).



EDUCATIONAL APPROPRIATIONS PER FTE STATE DIFFERENCES FROM U.S. AVERAGE, FISCAL 2013



Note: Dollars adjusted by Cost of Living Adjustment and Enrollment Index.
Source: State Higher Education Executive Officers.

OREGON FUNDING OF HIGHER EDUCATION

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Annual state funding per resident student (FTE)

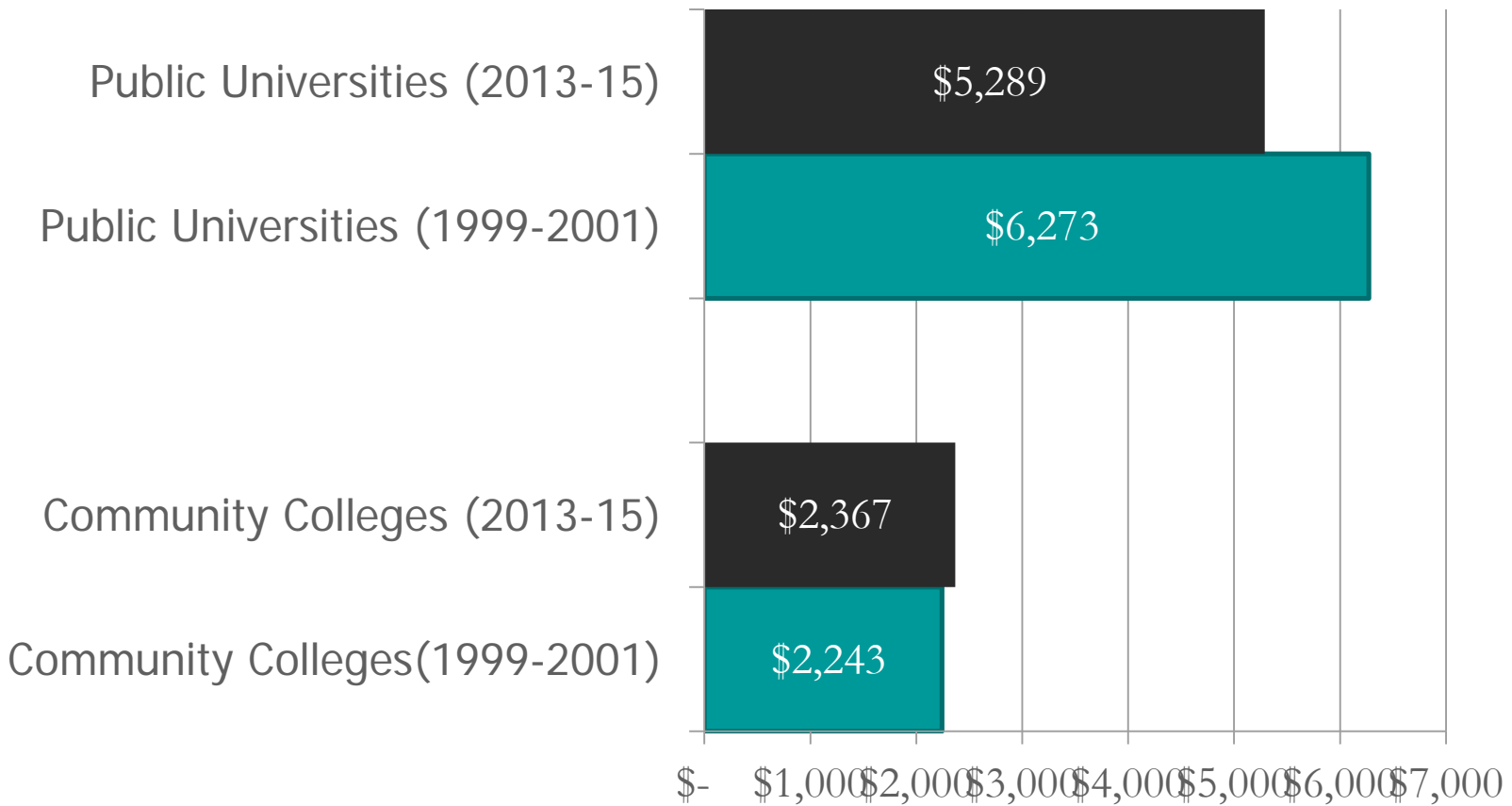


Source: Higher Education Coordinating Commission



OREGON FUNDING OF HIGHER EDUCATION

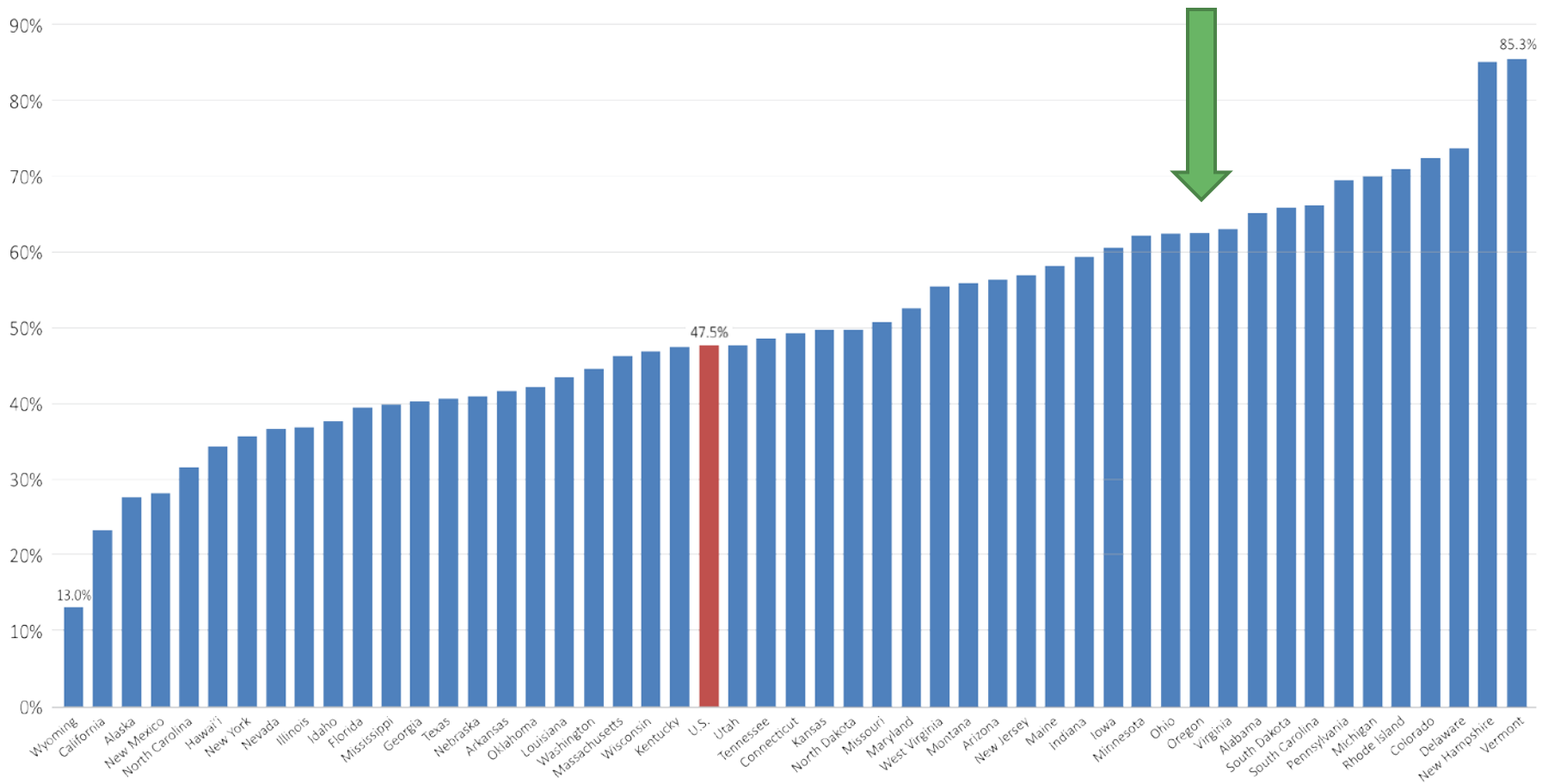
Annual state funding per resident student (FTE)



Source: Higher Education Coordinating Commission



NET TUITION AS A PERCENT OF PUBLIC HIGHER EDUCATION TOTAL EDUCATIONAL REVENUE BY STATE, FISCAL 2013

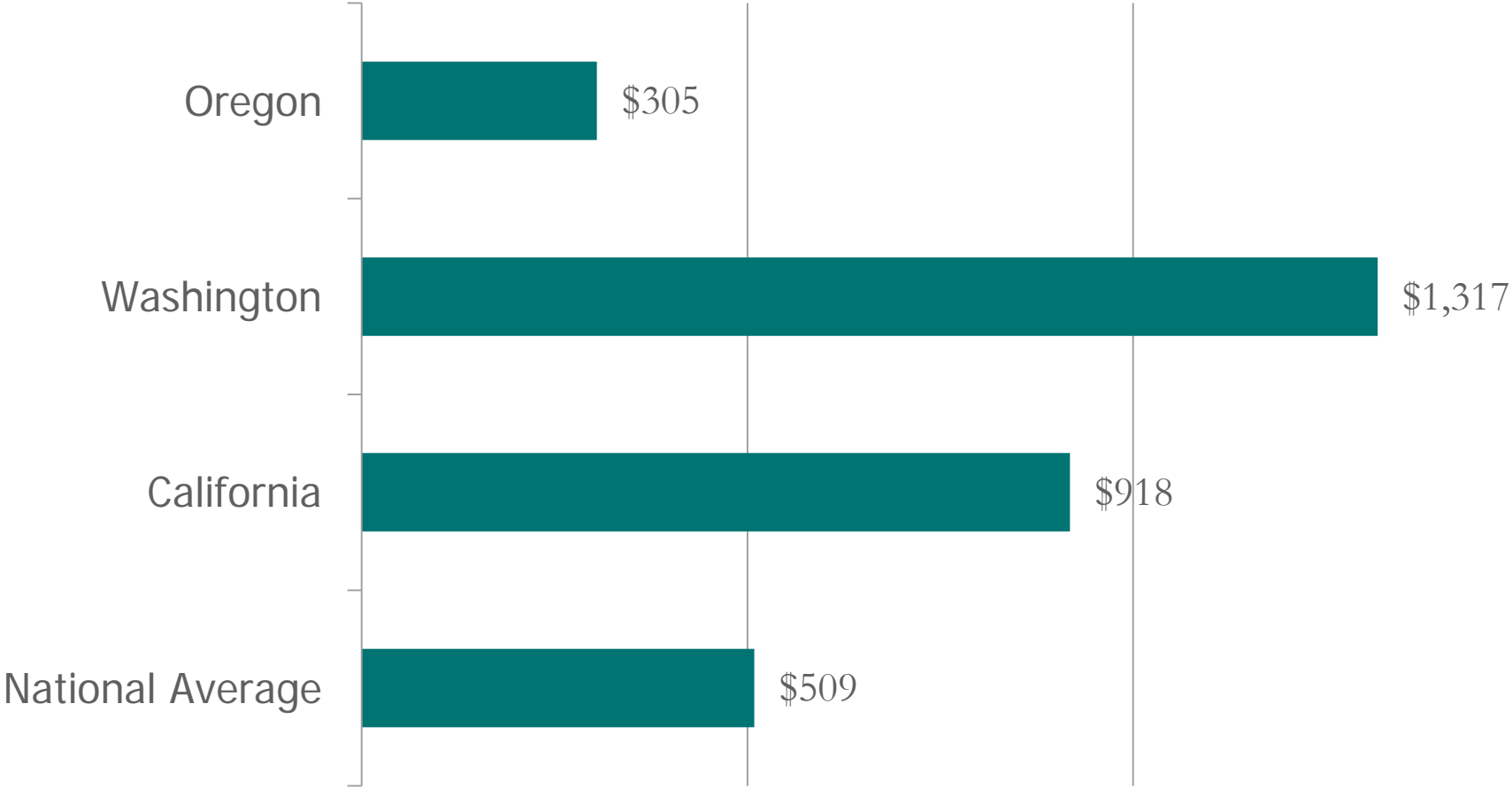


Note: Dollars adjusted by 2013 HECA, Cost of Living Adjustment, and Enrollment Index.
 Source: State Higher Education Executive Officers.

Source: Western Interstate Commission on Higher Education (WICHE)



STATE NEED-BASED AID PER STUDENT



Source: 44th Annual Survey Report on State-Sponsored Student Financial Aid, National Association of State Student Grant and Aid Programs (NASGAP)



MAJOR 2015 STATE ISSUES

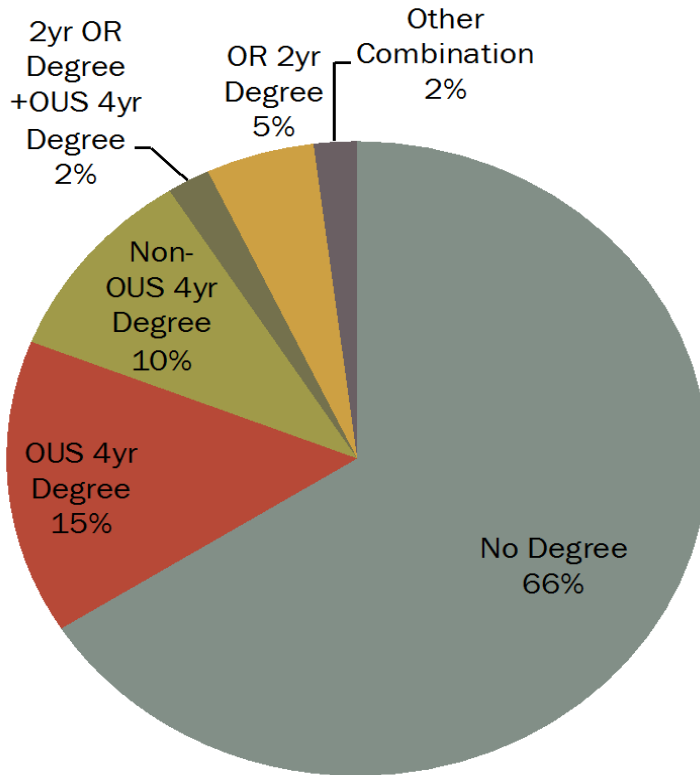
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- Funding
- Affordability: potential new investments in OOG, free community college, Pay it Forward, tuition policy
- Alignment: e.g. accelerated learning, dual credit, placement policies
- Outcomes-based funding
- Consumer protection: especially for-profit institutions
- Workforce training

So how do we get from here to there?

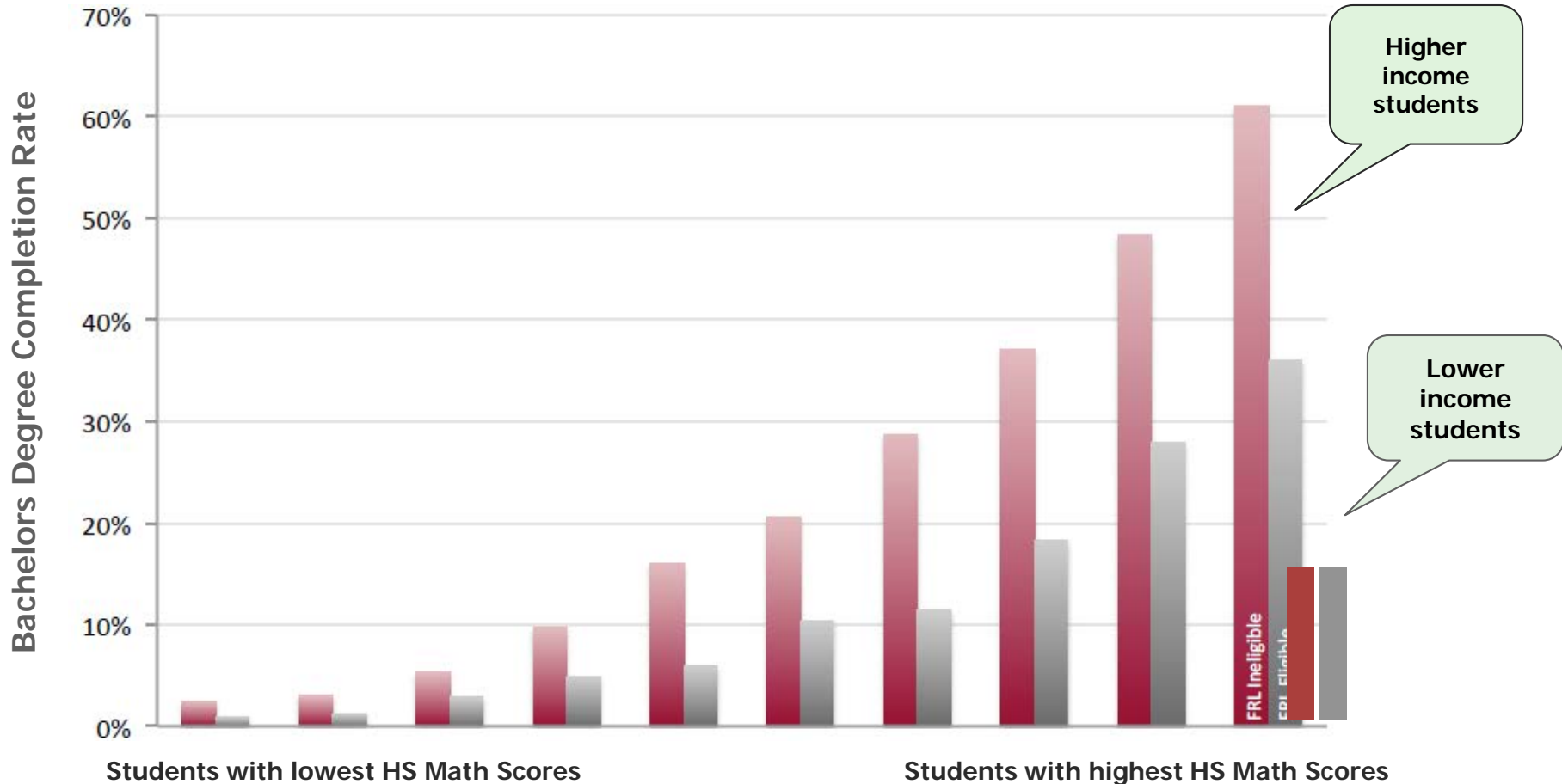


POSTSECONDARY OUTCOMES FOR OREGON'S HIGH SCHOOL GRADUATING CLASS OF 2005



| Outcome | Number | Percent |
|--------------------------------|--------|---------|
| No Degree | 21,335 | 66% |
| OUS 4yr Degree | 4,766 | 15% |
| Non-OUS 4yr Degree | 3,352 | 10% |
| 2yr OR Degree + OUS 4yr Degree | 465 | 2% |
| OR 2yr Degree | 1,533 | 5% |
| Other Combination | 741 | 2% |

STUDENTS IN POVERTY COMPLETE COLLEGE AT LOWER RATES REGARDLESS OF THEIR ACADEMIC SKILL LEVEL



The ten pairs of red/gray bars above show all Oregon students divided into 10 equal-sized groups based on their high school math scores. The vertical bars show the Bachelors degree completion rate for students eligible for free/reduced price lunch vs. those who are not eligible.

Source: ECONorthwest longitudinal analysis using matched ODE, OUS, CCWD, and NSC records

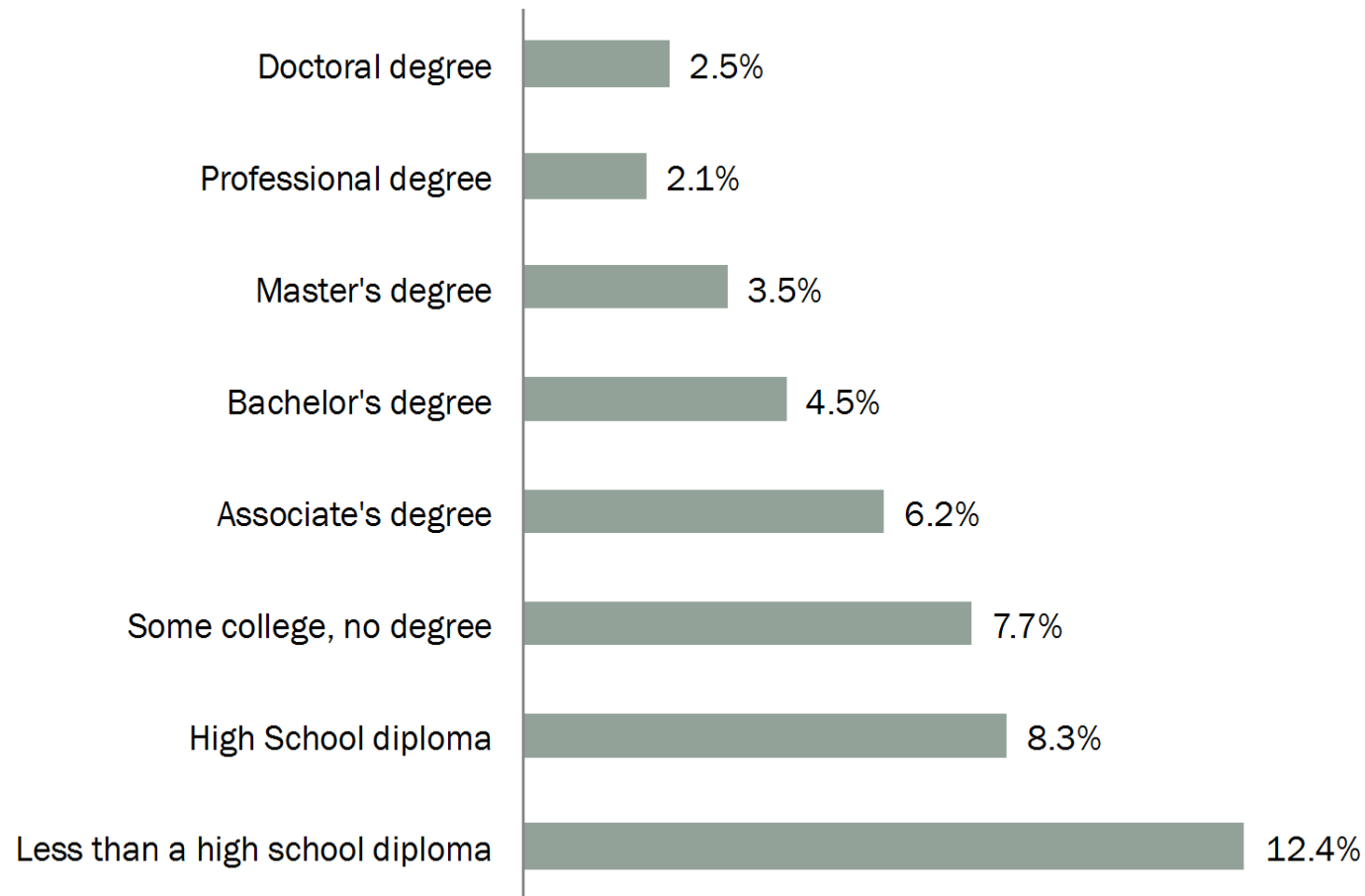
*So how do we get from
here to there,...*

AND WHY DOES IT MATTER?



UNEMPLOYMENT RATES BY EDUCATIONAL ATTAINMENT LEVEL, U.S., 2012

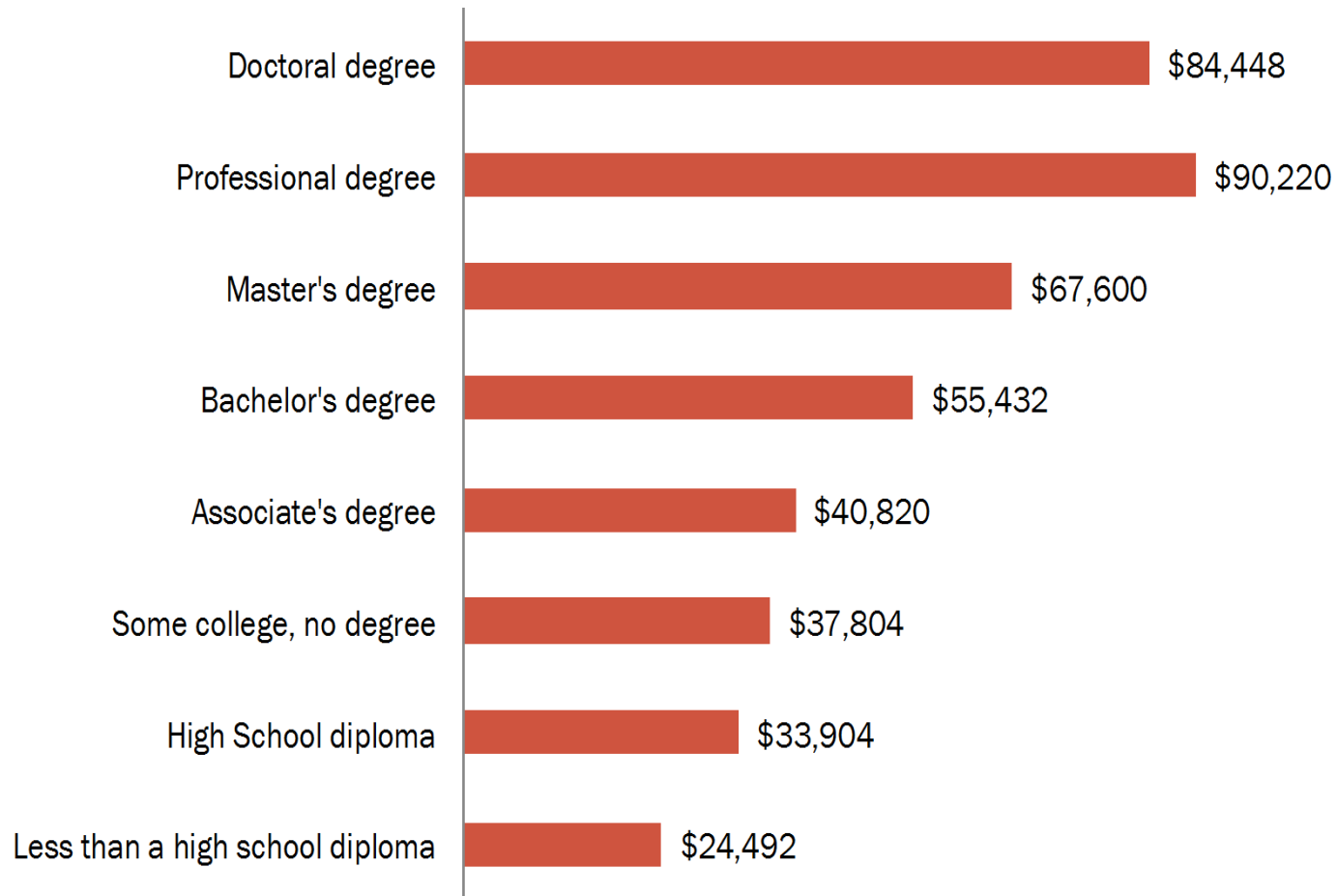
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Source: Bureau of Labor Statistics, Current Population Survey

MEDIAN ANNUAL EARNINGS BY EDUCATIONAL ATTAINMENT LEVEL, U.S., 2012

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Source: Bureau of Labor Statistics, Current Population Survey