Executive Order 20-09, issued March 19, prohibited most in-person activities at degree-granting colleges and universities through April 28.

Executive Order 20-17, issued April 17, extended the effective period of EO 20-09 through June 13.

As a result, most instruction, research, events, and other activities this spring have either been suspended or are occurring remotely.

HECC During the Pandemic

Guidance, convening, coordination, and communication: with institutional leaders, faculty, staff, students, OHA, legislators, Governor’s office.

HECC program modifications: financial aid flexibility, regulatory flexibility.

HECC workforce supports

Planning principles meant to help guide higher education’s work over the short and medium-term:

1. Postsecondary education and training are central to Oregon’s return to strength and prosperity
2. Affordability and access to postsecondary education and training require investments of the state funding
3. Equity must be central to all we do
4. To achieve our shared goals, we must all commit to collaborate and work together in new ways
Transition to Distance Learning

Successes

• Massive pivot in a compressed period of time
• Faculty present, engaged and committed
• Big jump forward in what faculty and staff think is possible; rapid expansion in remote delivery

Challenges

• Substantial time investment to reconfigure courses
• Scramble to learn new modalities, and to invest in delivery
• Labs and research designed for in person learning and not easily redesigned postponed with student time to graduation delayed
• Difficult to provide hands on courses
• Faculty and students unfamiliar with technology
• Home/residential environments not conducive to focusing and learning
• Difficulty accommodating individual student needs
Transition to Distance Learning

Technology

- IT and Technology support centers such as libraries stretched fiscally and staff wise
- Required unanticipated acquisition of technology/computers for faculty and students who typically relied on campus access
- Not all students have access to technology/computers at home, or have to share with others
- Lack of connectivity for faculty, students and staff at home, especially in rural areas

Wraparound Services

- Institutions still developing effective methods of wraparound support delivery
- Provision of physical, mental and behavioral health without violating professional rules and regulatory statutes to students who moved home to different states
- Sharply decreased use of tutoring and counseling services in online environment
Community College Enrollment is Down

The number of students and the number of full-time equivalents fell 18% in 2020

<table>
<thead>
<tr>
<th>Headcount</th>
<th>2019</th>
<th>2020 (est.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>98,329</td>
<td>80,754</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Full-time equivalent</th>
<th>2019</th>
<th>2020 (est.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>19,496</td>
<td>16,025</td>
<td></td>
</tr>
</tbody>
</table>

Fewer winter students returned in the spring in 2020, compared to 2019

<table>
<thead>
<tr>
<th>Winter-to-spring retention</th>
<th>2019</th>
<th>2020 (est.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>71%</td>
<td>66%</td>
<td></td>
</tr>
</tbody>
</table>

CTE enrollment has fallen sharply

- Career-technical education ↓ 27%
- Lower-division collegiate ↓ 10%

Source: Community college reports.
Notes: Data for 2020 are preliminary and may change. Enrollment counts represent for-credit enrollment and exclude accelerated learning credit.
Public University Enrollment is Steady

The number of students is steady

<table>
<thead>
<tr>
<th>Year</th>
<th>Resident undergrads</th>
<th>Nonresident undergrads</th>
<th>Resident graduate</th>
<th>Nonresident graduate</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>46,421</td>
<td>24,428</td>
<td>6,635</td>
<td>6,631</td>
</tr>
<tr>
<td>2016</td>
<td>45,909</td>
<td>23,943</td>
<td>6,647</td>
<td>6,462</td>
</tr>
<tr>
<td>2017</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2018</td>
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<tr>
<td>2019</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2020 (est.)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The percentage of winter students returning in spring is steady

<table>
<thead>
<tr>
<th>Year</th>
<th>Resident undergrads</th>
<th>Nonresident undergrads</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>90.8%</td>
<td>90.7%</td>
</tr>
<tr>
<td>2016</td>
<td>90.4%</td>
<td>90.5%</td>
</tr>
<tr>
<td>2017</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2018</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2019</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2020 (est.)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Both enrollment and winter-to-spring retention are steady across racial/ethnic groups

Source: HECC analysis of student-level data reported by institutions.
Notes: Data for 2020 are preliminary and may change. Counts include admitted undergraduate and admitted graduate students only. Nonadmitted students, including dual-credit students are excluded.
## Reliance on Different Revenue Streams Means Different Risks

### Revenue, Operating and Non-operating

<table>
<thead>
<tr>
<th></th>
<th>Universities, FY 2018</th>
<th>Colleges, FY 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tuition and Fee Revenue</td>
<td>1,027,847,000</td>
<td>240,304,077</td>
</tr>
<tr>
<td>Federal Student Aid</td>
<td>173,582,000</td>
<td>109,266,380</td>
</tr>
<tr>
<td>State Appropriations</td>
<td>505,074,000</td>
<td>433,528,661</td>
</tr>
<tr>
<td>Property Taxes</td>
<td>-</td>
<td>260,167,139</td>
</tr>
<tr>
<td>Auxiliary Revenue</td>
<td>523,278,000</td>
<td>53,121,518</td>
</tr>
<tr>
<td>Grant Revenue</td>
<td>456,566,000</td>
<td>22,299,875</td>
</tr>
<tr>
<td>Other Revenue</td>
<td>289,826,000</td>
<td>120,776,292</td>
</tr>
<tr>
<td><strong>TOTAL REVENUE</strong></td>
<td><strong>2,976,173,000</strong></td>
<td><strong>1,239,463,942</strong></td>
</tr>
</tbody>
</table>
# Potential Spring Term Impact of COVID-19

<table>
<thead>
<tr>
<th>Cost Categories</th>
<th>Universities % of Annual Revenue (FY2019)</th>
<th>Colleges % of Annual Revenue (FY2018)</th>
<th>Privates*</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tuition/Fee Revenue - Reduced Enrollments</td>
<td>17,984,123 2%</td>
<td>16,803,976 7%</td>
<td>10,621,402</td>
<td>45,409,501</td>
</tr>
<tr>
<td>Auxiliary Revenue Impact - Reduced Activity</td>
<td>63,283,505 12%</td>
<td>6,515,035 12%</td>
<td>37,375,164</td>
<td>107,173,704</td>
</tr>
<tr>
<td>Additional Cost of Course Delivery and Student Support</td>
<td>1,704,493</td>
<td>1,917,481</td>
<td>1,006,672</td>
<td>4,628,646</td>
</tr>
<tr>
<td>General Costs of Cleaning, Overtime for Personnel</td>
<td>(407,504)</td>
<td>1,793,329</td>
<td>(240,671)</td>
<td>1,145,154</td>
</tr>
<tr>
<td>Other Costs - Detailed</td>
<td>13,323,201 2%</td>
<td>2,904,117 1%</td>
<td>7,868,667</td>
<td>24,095,985</td>
</tr>
<tr>
<td><strong>Total Financial Impact</strong></td>
<td><strong>95,887,818 3%</strong></td>
<td><strong>29,933,938 2%</strong></td>
<td><strong>56,631,234</strong></td>
<td><strong>182,452,990</strong></td>
</tr>
<tr>
<td>CARES H.E. Relief Fund total</td>
<td>31,244,333</td>
<td>22,801,972</td>
<td>12,999,977</td>
<td></td>
</tr>
</tbody>
</table>

**Notes:** Survey responses are net of any expected savings. Tuition/fee revenue includes foregone revenue and any refund activity. Auxiliary includes housing, dining, athletics. University Other Costs includes $9.6m for cost of additional sick leave granted to employees.

* Private institution impact estimated based on public university experience.
CARES Act Provisions for Higher Education

• Higher Education Emergency Relief Fund
  • $134m in direct funding for Oregon institutions
  • About 50% required to be allocated directly to students for emergency aid
  • About 50% for institutional expenses related to COVID-19
  • Minor provisions for minority serving institutions

• Governor’s Emergency Education Relief Fund
  • $32.5m in funding for education activities at Governor’s discretion
  • All education sectors covered
  • Governor’s office still finalizing spending plan

Complete HECC Cares Act Summary
CARES Act Provisions for Higher Education

- **Financial Aid Provisions**
  - Students can receive work study funds even if unable to work
  - Students that withdraw due to Coronavirus-related barriers do not need to return student aid
  - Student loan payments frozen, interest free, through September 2020
  - Debt of borrowers that withdraw from a term due to emergency will be cancelled
When and How Will Institutions “Reopen”

- HECC-convened workgroups have developed recommendations for potential state standards for the conduct of some in-person activities starting this summer. OHA is currently reviewing those standards.
- We are awaiting a potential Executive Order to replace the expiring EO 20-09.
  - Not a reopening plan, but state health/safety standards that institutions would be required to meet.

“Best” case:
Colleges and universities are able to resume in-person activities this summer/fall, with modest modifications to physical layouts, group sizes, and other protocols, this summer and fall

“Worst” Case:
Colleges and universities are required to operate remotely throughout most/all of 2020-21
2021 Session and Long-Term Policy Implications

Higher Education in Oregon may be permanently transformed

- Affordability for Students
- Long Term Role of Distance Learning
- Financial Stability of Institutions and System Structure
- Equity Focused Reform
- Student Centered Education Delivery
By promoting collaboration and coordination between Oregon’s education and workforce partners, as well as through our own programs and policy leadership, HECC staff ensure that Oregonians experience increased access, equity, and success in completing their higher education, training, and career goals.

Rudyane Rivera-Lindstrom, Director of Diversity, Equity, & Inclusion

May 29, 2020
Commitment to Education Equity

“By promoting collaboration and coordination between Oregon’s education and workforce partners, as well as through our own programs and policy leadership, HECC staff ensure that Oregonians experience increased access, equity, and success in completing their higher education, training, and career goals.”

Supported/contributed to the creation of the original Oregon Equity Lens adopted 2011

Lens has evolved in its use over the years in our P20 education system

Currently in the process of embedding the Lens more consistently in our processes
Equity Work in a New Context

New activities are underway since the legislature funded a diversity, equity, and inclusion position in the 2019-2021 LAB

- Evaluation of needs and capacity
- Making connections with our external partners to inform policy and practice
- Setting four equity goals for a new equity action plan
Support of Institutions and Stakeholders

• Increased concerns about disparities in our system
• Provided resources and guidance to address the barriers and circumstances that surfaced due to the crisis:
  • Online access for classes
  • Mental health supports
  • Housing
  • Food scarcity
  • Increased discrimination and harassment
  • Affordability
• Guidance and planning for institutional cultural competency plans