

Report on Proof-of-Concept Projects at Oregon's Technical and Regional Universities and Portland State University from Financial Sustainability Funds in 2023-25 HECC Budget

December 15, 2023

Presented to the
Oregon Higher Education Coordinating Commission

Presented by
Eastern Oregon University
Oregon Institute of Technology
Portland State University
Southern Oregon University
Western Oregon University



Dear Director Cannon,

Please find the enclosed report on the proof-of-concept projects resulting from the funds allocated to Oregon's Technical and Regional Universities and Portland State University through a budget note in the 2023-25 Higher Education Coordinating Commission budget. This investment represents a unique opportunity presented by the Oregon legislature to support the financial sustainability of our five universities and maintain access to a postsecondary education for Oregonians.

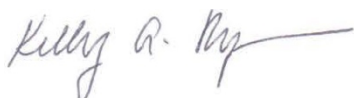
Our five universities have prioritized collaboration and joint decision-making in planning for distribution and utilization of these funds. While the initial investment of \$25 million is simply not enough to independently sustain any of our institutions in the long-term, we have worked together to ensure the funds are allocated for projects that will have the greatest collective impact on our students and the ongoing financial sustainability of our universities.

In determining how to best utilize these funds, our five universities worked with Oregon Solutions to manage the collaborative decision-making process and ultimately it was named a governor designated Oregon Solutions Project because of the broad community and agency support for using a collaborative approach to address the long-term financial sustainability for EOU, OIT, PSU, SOU, and WOU. The institutions also utilized a shared writer to develop this joint report to underscore our collaborative approach in distributing the funds. We have actively participated in the statewide workgroup with a comprehensive group of stakeholders and worked to engage our campus communities to develop proposals for future projects. Discussions with the HECC and the statewide workgroup about collaborative investments are ongoing and we expect to share more about those collaborative investments in the 2024 HECC report to the legislature.

This spirit of collaboration has resulted in the selection of many meaningful investments on our campuses, which will benefit our students and the financial sustainability of our institutions today and for years to come. You will read more about the Tranche 1 projects which have already begun, as well as our proposed Tranche 2 projects, in the following pages.

We look forward to ongoing discussions among the collaborative workgroup about future projects on our campuses as well as future shared investments.

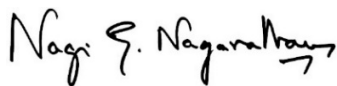
Sincerely,



Dr. Kelly Ryan
President, Eastern Oregon University



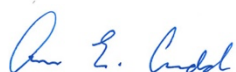
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Executive Summary

During the 2023 legislative session, the Oregon legislature appropriated \$25 million to Oregon's four Technical and Regional Universities (TRUs: Eastern Oregon University, Oregon Institute of Technology, Southern Oregon University, and Western Oregon University) and Portland State University (PSU) to invest in innovative projects to support the financial sustainability of the institutions. The following report details the collaborative process undertaken by the five universities to foster collaboration with the allocated financial sustainability funds and determine how best to utilize the funds to ensure the investments focused on student-centered projects that would also benefit the financial sustainability of the universities.

The universities have determined the types of projects which should be prioritized to support long-term financial sustainability: enrollment, student success and retention, administrative services and efficiencies, and workforce and economic development.

The report outlines the process undertaken by each university to engage their campus communities in deciding how best to utilize the funds, as well as a detailed explanation of all of the proof-of-concept efforts funded through the initial investment of financial sustainability funds, including for each project a spending plan and timeline, the impact on the university's operating budget, how the university will measure success, and how the campus has been engaged in the project development. In addition, the report presents the proposed projects that each university anticipates undertaking upon release of the funding held in the special purpose appropriation, as well as a high-level breakdown of both funding allocations. Finally, the report highlights the ongoing work among the five universities, together with the Oregon Higher Education Coordinating Commission (HECC), to identify opportunities for future collaborative investments that have the potential to make meaningful change as it relates to equitable student success and the long-term financial sustainability of PSU and the TRUs.

Introduction & Background

Oregon's public universities have faced repeated financial challenges over the last few years. A global pandemic, increased inflation, and decreased enrollment have put many of Oregon's universities, particularly Portland State University (PSU) and the state's Technical and Regional Universities (TRUs) in the difficult position of doing more to support students with fewer resources.

In order to help PSU and the TRUs (Eastern Oregon University, Oregon Institute of Technology, Southern Oregon University, and Western Oregon University) improve their financial sustainability, the Governor's Recommended Budget, released in February 2023, included a "\$15 million investment in funding for regional university planning and support to support innovative approaches to sustainability of the regional universities." Following this recommendation from the Governor's Office, the Oregon Legislature appropriated \$25 million in the 2023 Legislative Session for financial sustainability to the four TRUs and PSU "to expend on promising innovative proof-of-concept efforts to realign institutional offerings and resources with current and emerging enrollment and economic realities in order to create long-term institutional financial viability."

This funding was appropriated for one-time investments designed to generate cost savings or revenue increases that would improve institutional budgets over the long-term. It was not to be used to cover shortfalls in operations or provisional funding for programs or activities with ongoing costs. The initial portion of the \$25 million allocation (Tranche 1) was to be used to develop "proof-of-concept" ideas, which will be used to unlock access to the second allocation phase (Tranche 2).

The Tranche 1 funding represents approximately \$6 million distributed to the five institutions in September 2023. The resulting proof-of-concept efforts funded through the initial Tranche 1 investment represent meaningful, student-centered projects that are intended to improve each university's financial sustainability, while at the same time meeting the most pressing needs of the five institutions.

In determining the most impactful projects to fund through this process, the five universities focused their efforts on those initiatives which would most display transformative change on their campuses. While some projects are smaller and require less resources, others are larger, multi-year initiatives. However, all projects are focused on prioritizing equitable student success and the long-term financial sustainability of Oregon's public universities.

The five universities organized projects into four categories designed to meet the definition of long-term financial sustainability. Those four categories are enrollment, student success and retention, administrative services and efficiencies, and workforce and economic development.

Each university conducted a thorough process in deciding how their allocation of Tranche 1 funds would be used and recommendations to the HECC workgroup on how Tranche 2 funds would be used. Below is a summary of how each university reached decisions on how they would ultimately utilize their financial sustainability funds:

Eastern Oregon University:

For decades, Eastern Oregon University (EOU) has worked with its community college partners to create seamless student services to increase transfer and completion rates. After learning about the success of EAB's Moon Shot for Equity program in other regions of the country, EOU proposed investing in a similar type of program in eastern Oregon. In July 2022, Governor Kate Brown allocated \$1.6 million to launch an equity, retention, and completion collaborative partnership initiative at Eastern Oregon University, Treasure Valley Community College, and Blue Mountain Community College. The investment seeks to close equity and completion gaps for eastern Oregon students at two- and four-year colleges and universities by 2030. As a result of that initial investment, the initiative reviewed systems that commonly present barriers for students, scaled up systems that work, train, and educate faculty and staff, and will evaluate progress over a five-year period (2022-2027).

The continuing initiative is focused on increasing student retention and completion, the top two goals outlined in EOU's Strategic Plan, which was developed through a collaborative university-wide engagement process. In April 2023, EOU launched a Campus Climate Survey to seek insight from its campus community about diversity, equity, and inclusion to better support and inform its work through the equity, retention, and completion initiative. The Moon Shot project includes several collaborative workgroups on student success, made up of faculty, students, and staff. Since then, EOU has continued to share information about the initiative with its campus community.

When the Oregon legislature allocated the financial sustainability funding in the 2023 legislative session, EOU elected to utilize its portion of both the Tranche 1 and Tranche 2 funds to further the work of the equity, retention, and completion initiative. As EOU had already begun investing in the first phase of this initiative in collaboration with faculty and staff, the next step for the university was to continue that investment. In January 2024, the campus will convene workgroups to advance student success goals and strategies. They will prioritize advancing retention and completion goals and the progress made through the Moons Shot program. As a program that has already shown success for students in eastern Oregon, increasing the investment in this proven concept through the financial sustainability funding was a natural fit for EOU and its partner institutions. The vision is to continue this work beyond the EAB engagement and leverage experience to support this model for eastern Oregon in other regions of the state.

Oregon Institute of Technology:

Oregon Institute of Technology (Oregon Tech) focused its financial sustainability investments on four distinct initiatives:

1. Create pipelines and pathways for high school and community college transfer students
2. Increase retention
3. Study the needs of industry, community, and students to ensure that Oregon Tech is offering appropriate credentials, reaching out to students and underserved communities, and offering the right academic and wraparound services
4. Increase efficiencies and maximize cost savings through a strategic realignment of finance systems

Of its Tranche 1 funding, Oregon Tech set aside \$250,000 for growing high school and community college pipelines, \$200,000 for retention initiatives, \$250,000 for a workforce, community, and student needs assessment, and \$300,000 for a strategic realignment of finance systems.

Once these four focuses had been identified by a collaborative internal workgroup, including staff and university leadership from both Academic Affairs and Finance & Administration, Oregon Tech solicited feedback from campus stakeholders through meetings with campus union partners, an institution-wide community forum, via an online survey, and through real-time “open office hour” conversations with the university’s Vice President for Finance and Administration and Assistant Vice President for Government Relations. The online survey garnered nearly 200 responses. The feedback received through all mediums was incorporated into and shared with the workgroup, which grew to include faculty and student representatives, as well as other content experts. The specific proposals for the use of Tranche 1 and Tranche 2 funds were developed by this collaborative workgroup.

Portland State University:

Given the rapid timeline for deciding how best to use the Tranche 1 funds, PSU immediately sought proposals from campus leadership for potential Tranche 1 projects. Using a comprehensive Google form, PSU solicited ideas that showed evidence that they met the minimum threshold requirements set by the legislature and criteria agreed to by the TRU+ workgroup. In PSU’s process, Tranche 1 projects could request up to \$200,000. Some of the smaller projects were used to prepare for a larger ask from Tranche 2 funds, leverage external funding opportunities, or a combination of these. PSU received 32 funding requests for Tranche 1 projects. PSU’s Executive Council ranked these requests, debated them, and chose the projects outlined in this report.

For Tranche 2 projects, PSU utilized a broader campus engagement process. PSU received a total of 64 proposals for Tranche 2 funding. Six were eliminated for not meeting the minimum criteria, one was withdrawn by its sponsor, and four projects will be forwarded to the HECC

workgroup for consideration in the statewide collaborative projects funding pool. PSU held an open budget forum on November 7 at which university staff introduced the new Balancing Act participatory budgeting software and encouraged faculty, students, and staff to vote on the remaining 54 sustainability funding proposals. A total of 1,647 votes were cast by the PSU community. In total, 17 projects were selected to receive a portion of PSU's Tranche 2 financial sustainability funding.

Southern Oregon University:

Southern Oregon University's primary Tranche 1 project (CISR) was thoroughly vetted across the university's campus prior to the allocation of the sustainability funding. In the face of significant financial challenges and resulting budget cuts, the vetting process led to campus-wide understanding of and support for CISR work for long-term sustainability.

When the financial sustainability funding was allocated by the legislature, SOU engaged in a six-step campus engagement process to determine whether there should be other or additional priorities in light of the state funding. That campus engagement process included:

1. Cabinet: Sustainability funding was on the agenda at multiple Cabinet meetings throughout summer 2023, with discussion about best uses and how to engage campus in the conversation.
2. Super Cabinet: The sustainability funding was discussed as above with this broad campus leadership group, which includes the heads of SOU's shared governance organizations, unions, and student government as well as the directors of key student services areas.
3. Shared Governance: SOU's President Rick Bailey joined Faculty Senate and Staff Assembly meetings to explain about the sustainability funding and gather input.
4. Union Partners: President Bailey met with the heads of SOU's faculty and staff unions to explain about the sustainability funding and gather input.
5. Student Government: President Bailey joined a Student Government meeting to explain about the sustainability funding and gather input.
6. All-Campus:
 - President Bailey's all-campus email on November 8 invited all members of the campus community to a Campus Conversation on November 16. The President asked faculty, staff, and students to "think about the following topics so that we can brainstorm solutions together" at the Conversation. The sustainability funding was listed first and described in the greatest detail, of four Conversation topics.
 - The Campus Conversation was held on November 16 and live streamed. President Bailey provided background on the sustainability funding, including the parameters established by the legislature's Budget Note. He then opened the floor to feedback, ideas, and questions. Nine comments were received and acknowledged with appreciation. President Bailey invited additional comments, questions, and ideas to be submitted via email to his executive assistant; four additional comments were received that way.

As a result of this process, in addition to the original CISR proposal (which continued to have campus support), SOU's Tranche 2 proposals include an additional concept that was widely supported by campus stakeholders and is consistent with the financial sustainability funding parameters outlined by the legislature.

Western Oregon University:

In order to determine where WOU's Tranche 1 funds would be best utilized, the university worked with its University Budget Advisory Committee (UBAC), comprised of faculty, students, and staff, to align its allocation criteria to those that are parallel at the HECC workgroup level including A) a realistic pathway for generating more revenue than expenses (not necessarily within the two-year biennium, but clearly on a path to meeting this criterion); or B) projects may alternatively propose optimization of current services to reduce future expenditures.

Concurrently, WOU is engaging in a multi-phase equity assessment. Initial findings from the assessment have indicated areas of optimization and enhancement across the university. While the Tranche 1 initiatives identified by WOU will ultimately be the responsibility of their respective departments, the equity assessment will serve as the foundation and additive principle to the previous criteria. All financial sustainability projects must align with WOU's Diversity, Equity, Inclusion and Accessibility goals and recommendations resulting from the university's equity assessment. Each selected initiative was categorized in relative areas of application on the equity assessment.

WOU's UBAC has initiated a campus-wide outreach plan to seek recommendations that would be shared with the HECC workgroup. This outreach is expected to conclude on December 18 and final recommendations to be given to the HECC workgroup prior to the end of the year. WOU also plans to use its Tranche 2 financial sustainability funding to continue the work of three of its Tranche 1 projects, as listed below:

- Operation Wolfstorm (Partnership with Chemeketa Community College);
- Doctorate in Occupational Therapy Program; and
- First-Generation Support/HSI Initiative.

In addition to the Tranche 1 projects initiated by each of the five universities, the five recipient institutions have jointly hired Oregon Solutions to ensure a collaborative process for determining the most equitable distribution of funds, hired a shared writer to present this joint report, and are engaging in ongoing discussions with the HECC and statewide workgroup about ongoing collaborative investments.

While conversations about ongoing investments are continuing, this report also details a number of proposed projects on each campus using Tranche 2 funds. The five universities welcome ongoing discussions with the statewide HECC workgroup about how best to utilize those funds both on the individual campuses and through collaborative investments.

Tranche 1 Funding Breakdown

<u>Eastern Oregon University</u>	
Equity, Retention and Completion	\$1,000,000
Total	\$1,000,000
<u>Oregon Institute of Technology</u>	
Grow High School and Community College Pipelines	\$250,000
Retention Coaching Proof of Concept Pilot Program	\$78,000
Coursedog Analytics	\$106,105
Workforce, Community, and Student Needs Assessment	\$250,000
Canvas Impact Tool	\$15,876
Strategic Realignment of Financial and Budget Software Solutions	\$300,000
Total	\$999,981
<u>Portland State University</u>	
Enrollment Analyst	\$110,000
Direct Admissions: Streamline the College Application Process	\$50,000
“It’s all Here” Campaign	\$125,000
Center for Internship, Mentoring and Research (CIMR)	\$100,000
Sustainable Fashion and Game Design Degree Exploration	\$200,000
Clean Industry Hub	\$150,000
Generative AI for Graduate School and Enrollment Management	\$60,000
PSU-PCC Co-Enrollment Platform	\$200,000
InnovAlte Research	\$20,000
Virtual First Stop	\$200,000
Campus Utility Systems Study	\$200,000
Participatory Budgeting	\$15,000
Strategic Planning	\$500,000
Total	\$1,930,000
<u>Southern Oregon University</u>	
Core Information System Replacement – Finance/HR (CISR-F/HR)	\$1,000,000
Total	\$1,000,000
<u>Western Oregon University</u>	
Operation Wolfstorm	\$96,714
Common Application	\$10,000
Destination Western	\$200,000
First Generation Support	\$95,000
Salary Study	\$110,000
Center for Teaching & Learning	\$194,500
Occupational Therapy Doctorate (OTD) Program	\$195,000
Banner Optimization for HR Practices	\$100,000
Total	\$1,001,214
<u>Joint Investments</u>	
Oregon Solutions	\$40,000
Shared Report Writer	\$45,000
TBD Shared Study/Consultant	\$100,000

Tranche 1 Campus Projects & Impacts

Enrollment Projects

Oregon Institute of Technology: Grow High School and Community College Pipelines

Oregon Tech serves roughly 4,000 students yearly through its dual credit program. The state of Oregon has developed strong recommendations for dual credit engagement related to high schools partnering directly with colleges to create accelerated credit opportunities and/or to articulate courses that are highly transferable to colleges across the state. Since 2014, Oregon Tech has expanded its dual credit efforts to serve the needs of its high school partners to include rural districts.

Oregon Tech has partnered with influential and innovative programming such as Willamette Promise that impacts access and equity across the dual credit and early transfer landscape for students. Oregon Tech focuses on articulating general education courses that impact basic degree requirements for many bachelor degree seeking students.

Oregon Tech is utilizing its Tranche 1 sustainability funding to build programming with clear pathways for its dual credit students and subsequent transfer students from its partner community colleges that are the university's primary partners in the dual credit space. The program will work to emphasize the "value" of taking courses early (in high school), at a low cost to students and families, and connect this work to the student's collegiate intentions. This pathway program will align with national trends around Guided Pathways and will encourage direct matriculation to Oregon Tech when appropriate.

The program's primary goals are to:

- Directly connect high school and community college coursework for students
- Enhance the enrollment process for dual credit and transfer students
- Engage Oregon Tech departments to actively participate and develop direct pathways to Oregon Tech from community college and high school partners
- Develop a direct admit process for all dual credit students at Oregon Tech
- Implement transfer software to empower student-driven advising
- Transfer software will also deliver data analytics to better address gaps in student transferability

By directing resources to recruiting Oregon Tech's dual credit and transfer student populations, this project will increase enrollment. Oregon Tech will focus on four major initiatives throughout the implementation of the awareness campaign, pathway construction, and transfer software strategies:

Outreach

- Get the word out (focusing on low-cost pathways and underrepresented student populations).
- Partner with community groups, churches, broaden awareness about college readiness and relevance related to the dual credit programming in the high schools and how students/families who are not normally represented in these courses gain access. Oregon Tech will work to create systems of awareness throughout its communities.

Alignment

- Oregon Tech's program will work to develop explicit connection to guided pathways and programming at the university.
- Connect the high school academies or programs of study to Oregon Tech – the university will work with partner high schools to organize high school student electives relevant to programming at Oregon Tech.

Advising

- Provide college advising to dual credit students and prioritizing underrepresented students.
- Build out clear online tools, training, and provide advisors to high school partners.
- Directly partner with AVID to enhance support for underrepresented students.

Support

- Support students by managing and working with high school teachers to provide quality in-class instruction for students.
- Continue to address equity concerns and rigor related to curriculum.
- Develop a more responsive curricular approach to DC alignment.

Project Spending Plan & Timeline

Fall 2023:

- Create cohesive team of admin, staff, and faculty to develop and oversee plan
- Develop and finalize project deliverables with Oregon Tech Team
- Develop budget for each pipeline project

Winter 2024:

- Complete RFP for branding/marketing pathways
- Select firm for projects
- Start software implementation

Spring/Summer 2024:

- Implementation of transfer software
- Build awareness and expand communication to transfer students about transfer software

Fall 2024:

- Implement Advising and Outreach Strategy to student populations
- Disperse new materials for dual credit/transfer programs
- Launch direct admit program for dual credit students

Winter 2025:

- Data Collection Reporting on Pipeline Initiatives subgroup

Spring 2025:

- Finalize sustainability pipeline work

Pipeline Initiative	Budget
Pathway Development/DC Marketing	\$100,000
Outreach/Events/Campus Access	\$60,000
Transfer Software Implementation	\$60,000
Course Development/DC Course Quality Overview	\$30,000
Total Pipeline Budget	\$250,000

Impacts on Operating Budget

The project will serve as both a cost saving and a revenue generating measure for Oregon Tech. Cost savings will result from the transfer software and streamlining the enrollment process for dual credit students by reducing human hours spent advising and assisting with enrollment. The intent of the work is to develop relationships with students and families to better understand credit transferability, the value of Oregon Tech’s programming and the savings on time-to-degree. This pipeline work is intended to result in direct matriculation from these two student populations which will impact overall revenue for the institution.

Measuring Success

As a result of this project, Oregon Tech will achieve greater awareness among students, families, and communities regarding the nature of Oregon Tech programming and the connectivity between the courses students are taking in high school to their selected degree pathway after graduation. The university plans to implement a direct admissions process for Oregon Tech dual credit students that will show the path forward with degree programming. Its goal is to work to better advise and support student decision-making with critical information regarding cost savings and time to degree by selecting Oregon Tech pathways.

Success for this project will be measured by the number of students reached through outreach strategies and direct enrollment growth in Oregon Tech’s transfer and dual credit populations. Clear and actionable deliverables will be developed during the first stage of this project in winter 2024. Oregon Tech plans to build a team that can effectively support the development and execution of the project.

Success will also be measured by the number of students contacted through these outreach strategies, and the direct application and enrollment growth in Oregon Tech's transfer and dual credit populations. Key performance indicators that will be tracked include the number of students contacted, the number of students who inquire, apply, and enroll as transfers or from dual credit programs.

Campus Engagement

This project has been shared with the Oregon Tech sustainability team. This initiative was also shared with the university community, including students, staff, and faculty during a public forum and in a campus wide email.

Portland State University: Enrollment Analyst

Portland State University will use \$110,000 of its financial sustainability funds to engage an enrollment analyst to maximize course enrollment and resource utilization. Once hired, the enrollment analyst will provide central support, training, and tools to PSU's schools and colleges with the goals of improved course planning, capacity forecasting, curricular efficiency, and workforce planning.

Project Spending Plan & Timeline

This work started in October 2023 and has been funded through fiscal year 2024. PSU has allocated \$110,000 for this project.

Impacts on Operating Budget

This project is expected to reduce costs for PSU through maximum utilization of full-time faculty, adjuncts, and graduate teaching assistants. The enrollment analyst has the potential to increase revenue for PSU through improved student persistence/graduation rates. In addition, this initiative will result in increased fill rates in courses and improved academic efficiencies that support degree progression, allowing PSU to continue to serve its students in a resource constrained environment.

Measuring Success

Success for this initiative will be measured through improved course enrollments and fill rates, as well as a reduction in instructional costs. PSU will also be able to track persistence and graduation rates, which are impacted by many initiatives, in addition to this project.

Campus Engagement

At PSU's November 2023 Faculty Senate meeting, the provost announced the new enrollment analyst. The enrollment analyst introduced herself at the recent Dean's Council meeting and advised how schools and colleges can engage with her and her work.

Portland State University: Direct Admissions: Streamline the College Application Process

PSU utilized \$50,000 of its Tranche 1 financial sustainability funds to enroll in the Common App Direct Admission and Niche Direct Admission programs. Through these programs, PSU seeks to streamline the college application process for Oregon students. For both programs, PSU pays a fee to the company, and they identify students who have not applied to PSU but have academic and demographic profiles that make them likely enrollees.

Project Spending Plan & Timeline

PSU has already invested the \$50,000 in the Common App Direct Admission and Niche Direct Admission programs.

Impacts on Operating Budget

This project aims to increase enrollment by seeking out students who did not initially apply to PSU but would be a good fit for enrollment at the university. Through this model, any enrollments generated from either program will result in pure tuition and state support revenue.

If the project proves to be successful, PSU plans to request additional funds from the general university operating budget (which will have been enhanced by the new enrollments) to make it a part of the university's permanent budget.

Measuring Success

Success for this project will be measured through new student enrollees.

Campus Engagement

A press release about PSU's new direct admission program was issued in November 2023. An overview of both programs was also shared publicly with PSU's Board of Trustees.

Portland State University: "It's all Here" Campaign

The "It's all Here" campaign is designed to leverage PSU's new status as a majority BIPOC undergraduate student institution and claim this status as a competitive advantage. PSU has countless supports and opportunities at PSU and in the Portland community for BIPOC people but finding them or seeking them out can be difficult unless you know where to look.

This initiative will be conducted alongside existing storytelling and marketing initiatives, with a specific focus on BIPOC communities and PSU's connections to and in the area. PSU does not currently have any standing or permanent diversity-specific marketing messages or assets, nor does it leverage its diversity as a competitive advantage.

This initiative re-introduces this new PSU, with its new demographics and identity. These pieces will help support a sense of belonging for students, as well as enhance PSU's desirability to prospective students and encourage BIPOC alumni to re-engage with the university.

Project Spending Plan & Timeline

PSU has allocated \$125,000 for this project. The funding will support production consultants, who will interview, edit, and produce video assists, as well as digital and print assets.

Impacts on Operating Budget

At its core, this project is about branding that will help recruit new students by helping them know there is a place for them at PSU. This branding will help foster pride and a sense of belonging with current students, while raising their awareness of the people and services at PSU for minority communities. This project has the capacity to increase revenue by better positioning the university and engaging students who might not choose PSU otherwise. This project utilizes one-time funding to develop marketing assets that can be used for years to come.

Measuring Success

Success for this project will be measured through increased awareness of PSU's diversity, increased sense of belonging associated with the university internally and externally with BIPOC communities, and increased visibility of PSU's multicultural services.

Campus Engagement

Students, faculty, staff, and alumni have been engaged with this project by serving as interviewees for the video campaign already in development.

Western Oregon University: Operation Wolfstorm

Operation Wolfstorm is a collaborative initiative between Western Oregon University (WOU) and Chemeketa Community College aimed at enhancing academic and administrative services. The project focuses on creating seamless transfer pathways, facilitating dual enrollment programs, and exploring shared data and administrative services for enrollment and retention. This initiative aims to streamline the educational process, thereby reducing the duration and cost of higher education for students. The project's ultimate goal is to provide students with

efficient pathways to graduation and potentially enable them to earn multiple credentials within a standard four-year degree timeline.

Project Spending Plan & Timeline

Western Oregon University has allocated \$96,714 of its Tranche 1 financial sustainability funds for Operation Wolfstorm. The spending will be directed toward developing transfer pathways, establishing dual enrollment programs, and integrating administrative services.

The timeline for this project has not yet been specified but is expected to be implemented progressively, focusing first on immediate opportunities for collaboration and resource sharing.

Impacts on Operating Budget

Operation Wolfstorm is a cost-saving measure, focusing on optimizing existing services by creating more efficient academic and administrative processes. This optimization is anticipated to both reduce institutional costs and lower the financial burden on students, potentially leading to a decrease in the duration of their educational journey.

By offering streamlined transfer pathways and dual enrollment options, this initiative could attract more students seeking a flexible and cost-effective educational experience. This could lead to an increase in enrollment as students recognize the value and efficiency of the programs offered.

Measuring Success

Success for this project will be measured by the increased efficiency in transfer processes, higher rates of student retention and graduation, and the cost savings realized by both the institutions involved and students.

Campus Engagement

The University Budget Advisory Committee (UBAC) of Western Oregon University, representing faculty, staff, and administration, has successfully concluded an extensive outreach initiative with the WOU community. This endeavor, announced by President Peters and UBAC, sought innovative proposals to potentially utilize funding allocated to WOU. The committee requested brainstorming and idea submissions via a survey, emphasizing criteria such as generating revenue, enhancing WOU's vision, focusing on student needs, boosting enrollment, and fostering engagement across the university. UBAC has received over 75 diverse responses from students, faculty, and staff, primarily aligning with Tranche 1 project objectives. These insights will be instrumental in guiding Tranche 2 funding decisions and further advisement by UBAC.

Western Oregon University: Common Application

Joining the university common application platform is a strategic move by Western Oregon University to enhance its accessibility and visibility. The project aims to simplify the application process for prospective students, reach a broader applicant pool, and potentially increase enrollment.

Project Spending Plan & Timeline

The university has allocated \$10,000 for this initiative, with \$7,000 for the initial joining fee and \$3,000 for annual fees. This investment is expected to maintain the university's presence on the platform and leverage its benefits for attracting a diverse range of applicants.

Impacts on Operating Budget

By joining the common application platform, Western Oregon University expects to attract more applicants, leading to increased enrollment and operational efficiency. This project has the potential to increase revenue through increased enrollment.

Measuring Success

Success for this project will be measured by the increase in application numbers at WOU, diversity of the applicant pool, and conversion rates of applications to enrollments.

Campus Engagement

The University Budget Advisory Committee (UBAC) of Western Oregon University, representing faculty, staff, and administration, has successfully concluded an extensive outreach initiative with the WOU community. This endeavor, announced by President Peters and UBAC, sought innovative proposals to potentially utilize funding allocated to WOU. The committee requested brainstorming and idea submissions via a survey, emphasizing criteria such as generating revenue, enhancing WOU's vision, focusing on student needs, boosting enrollment, and fostering engagement across the university. UBAC has received over 75 diverse responses from students, faculty, and staff, primarily aligning with Tranche 1 project objectives. These insights will be instrumental in guiding Tranche 2 funding decisions and further advisement by UBAC.

Student Success & Retention Projects

Eastern Oregon University: Equity, Retention and Completion

Moon Shot for Equity is a five-year initiative between EOU, Blue Mountain Community College (BMCC), and Treasure Valley Community College (TVCC) to establish an integrated regional education ecosystem breaking down traditional barriers by creating seamless pathways across institutional platforms to improve student retention and completion, and to close the equity gap.

EOU, TVCC, and BMCC serve two-thirds of the state in a region where the student population is rapidly diversifying. Students in this region are among the most marginalized because of location, income, and educational systems that are part of the intrinsic bias and barriers to access and outcomes for culturally and ethnically diverse populations.

EOU, TVCC, and BMCC want to break barriers systemically to eliminate the equity gap and increase access, retention, and graduation rates for students in eastern Oregon. This initiative includes national expertise with a proven record of success in how to review policies and practices, lead change management in campus climate, and help implement best practices to build an equity-focused educational approach with accountability for outcomes.

Project Spending Plan & Timeline

The Moon Shot for Equity project began in 2021 and is based on a five-year plan of sustained investments through 2026. The one-time investment will lead to transformational change to academic supports and instruction that will be integrated into the campus work under EOU's biennial operating budgets.

To date, approximately \$1 million has been invested from the first distribution of financial sustainability funds from the legislatively adopted budget for 2022-25. The next distribution of \$2.3 million is critical to continuing to advance this work for the 2024-25 year.

Impacts on Operating Budget

This project is focused on access for new students and retention, which will support revenue generated by student tuition and fees. By reducing drop-out rates at all three institutions and retaining more students, this project will reduce the cost of recruiting more first-time students and optimize student transfer and completion rates through shared software platforms.

The goal of this project is to increase enrollment and completion by removing barriers to student retention and success, including dual enrollment, degree completion pathways, equity and student success training for faculty and staff, and collaborative software systems to enable ease of transfer between institutions and improved record-keeping.

Moon Shot for Equity is a one-time investment that is sustainable over the long term because it transforms the way EOU and its partner institutions approach and deliver education to students across the region.

Measuring Success

Success for this project will be measured through tracking of student retention and completion at all three institutions.

Campus Engagement

EOU students, faculty, and staff are aware of the project and are engaged in the implementation of training for best practices in student success and retention.

Oregon Institute of Technology: Retention Coaching Proof of Concept Pilot Program

Oregon Tech will use a portion of its Tranche 1 financial sustainability funds to initiate a small pilot/proof-of-concept program for retention and student success coaching of a small group of freshmen or recent transfer students.

The pilot will identify a list of students who are at high risk of non-retention. The coaching service will contact the students and invite them to participate in one-on-one student success coaching with a coaching professional external to the institution. The coaching service invitations will continue until the small pilot program is fully subscribed. The small pilot program will provide external coaching services for two consecutive terms. The focus of the coaching sessions will be on retention, student success, study skills, engaging with university services such as tutoring and student groups and developing resilience and other key soft skills. Pilot program success will be measured by continuing enrollment in each successive term by the students in the pilot. Oregon Tech will benchmark the continuing enrollment and retention of the pilot group against its larger program and university-wide communities.

Project Spending Plan & Timeline

The contract for this project will be created and vetted by university processes. The implementation timeline is estimated at two weeks of remote and in person meetings. As Inside Track is a Portland-based non-profit coaching organization, meetings will take place remotely but also in person at Oregon Tech's Portland Metro campus or at the Inside Track offices.

Impacts on Operating Budget

Oregon Tech anticipates seeing an increase in continuing student retention, as well as reduced time to graduation, as a result of this pilot project. By optimizing term-to-term retention of students across both online and on-campus programs, tuition revenue is expected to be stronger and more stable. The addition of these analytics will also allow the university and individual academic departments to improve course and program retention. This project is expected to have a minimal impact on Oregon Tech's long term operating budget.

Measuring Success

The success of this project will be measured by improved retention and graduation rates and improved student satisfaction.

Campus Engagement

This project has been vetted by Oregon Tech’s Retention subcommittee and shared with the Oregon Tech sustainability team.

Oregon Institute of Technology: Coursedog Analytics

Oregon Tech will utilize a portion of its Tranche 1 financial sustainability funds to implement a new Integrated Academic Operations Platform, Coursedog. By adding academic operations analytics and catalog/curriculum modules through Coursedog, Oregon Tech will be able to better support student success with actionable scheduling and curriculum analytics built for improving operational efficiency and accelerating degree completions. These modules will give Oregon Tech the ability to easily design degree plans, develop pathways to completion, and enable the university to improve program completion using analytics.

This project is expected to result in an increase in continuing enrollment for current students by using the analytics within Coursedog. These analytics will help Oregon Tech to be able to predict course demand and to use a more data informed approach to course scheduling, thus, helping the university to increase enrollment by increasing student retention. By using Coursedog, Oregon Tech will be able to schedule courses that it knows are in high demand each term, allowing students to stay on track with degree progress.

Project Spending Plan & Timeline

The contract for this project will be created and vetted by university processes and funds (\$106,105) are expected to be spent by December 15, 2023. The implementation timeline is estimated to be a total of seven months.

Impacts on Operating Budget

By optimizing the course scheduling process utilizing real time data analytics, Oregon Tech estimates that this project will generate revenue for the university through the retention of students. Better student retention statistics and shorter time to degree completion should also help the university recruit more students. Pieces of this initiative will also replace some existing software licenses, resulting in cost savings.

The initial funds invested would pay for the first year of the product and the implementation service fee. The annual cost to the institution after the initial investment would be about \$38,000, which would be offset by the retention of current students.

Measuring Success

Success for this project will be measured by improved student retention and graduation rates and improved student satisfaction.

Campus Engagement

This project has been vetted by the Oregon Tech's Retention subcommittee and shared with the Oregon Tech sustainability team. This initiative was also shared with the university community, including students, staff, and faculty during a public forum and in a campus wide email. This project was informed by feedback from a Qualtrics survey and feedback during office hours with institutional leaders.

Western Oregon University: Destination Western

Destination Western is a bridge program aimed at helping incoming students transition smoothly into university life. It includes a two-week summer immersion program where new students stay on campus, engage in peer-to-peer counseling, and learn from upperclassmen about adapting to the university environment. Participants receive a stipend to offset potential lost wages during this period. The program, having evolved over the past two years, boasts an impressive 84% student retention rate and has been instrumental in developing leadership skills among upper classmen students.

Project Spending Plan & Timeline

Western Oregon University has allocated \$200,000 of its Tranche 1 financial sustainability funds for Destination Western. This funding is intended to maintain the program's current operations while a sustainable long-term budget is developed for integration into the university's general budget.

The project's timeline includes ongoing assessment of its impact, particularly in terms of student graduation rates for cohorts that have participated in the program.

Impacts on Operating Budget

The Destination Western program aims to optimize student services by enhancing student retention and success, which, in turn, could lead to a more stable and potentially increased revenue stream for the university. The initial investment is also seen as a potential leverage for attracting additional philanthropic funds. By improving student retention and graduation rates, this project will contribute indirectly to the university's revenue stability. The program's integration into the general budget reflects its sustainability and importance to the university.

Measuring Success

Success will be measured by retention and graduation rates of participating students, the development of leadership skills among upperclassmen involved in the program, and the ability to attract additional funding.

Campus Engagement

The University Budget Advisory Committee (UBAC) of Western Oregon University, representing faculty, staff, and administration, has successfully concluded an extensive outreach initiative with the WOU community. This endeavor, announced by President Peters and UBAC, sought innovative proposals to potentially utilize funding allocated to WOU. The committee requested brainstorming and idea submissions via a survey, emphasizing criteria such as generating revenue, enhancing WOU's vision, focusing on student needs, boosting enrollment, and fostering engagement across the university. UBAC has received over 75 diverse responses from students, faculty, and staff, primarily aligning with Tranche 1 project objectives. These insights will be instrumental in guiding Tranche 2 funding decisions and further advisement by UBAC.

Western Oregon University: First Generation Support

The First Generation Support initiative at Western Oregon University is designed to cater to the growing population of first-generation students, aligning with the university's pursuit of an HSI (Hispanic Serving Institution) designation. This program will enhance existing academic advising and mentorship programs, providing specialized support and tailored workshops to address the unique challenges faced by first-generation students. Additionally, the program will establish partnerships with local businesses for internships and co-op opportunities, thereby improving the employability of graduates.

Project Spending Plan & Timeline

Western Oregon University has allocated \$95,000 of its Tranche 1 financial sustainability funds for this initiative. The funds will be used to support the dedicated First Generation program, including enhancing academic advising, mentorship, and developing tailored workshops and partnerships.

The timeline for implementation and expansion of these services will align with the ongoing efforts to increase support for first-generation students.

Impacts on Operating Budget

This project aims to reduce attrition rates, saving recruitment costs, and fostering a culture of giving back among alumni, potentially leading to increased philanthropic contributions. By decreasing attrition rates, the First Generation Support program is expected to optimize current services, leading to cost savings. The collaboration with businesses for internships and the involvement of successful alumni in mentorship and fundraising are strategies aimed at generating revenue and building a sustainable financial model for the program. Additionally, the program's alignment with the university's goals for HSI designation underscores its strategic importance.

Measuring Success

Success for this project will be measured by the retention and graduation rates of first-generation students, the effectiveness of partnerships with local businesses, and the level of engagement and contributions from alumni.

Campus Engagement

The University Budget Advisory Committee (UBAC) of Western Oregon University, representing faculty, staff, and administration, has successfully concluded an extensive outreach initiative with the WOU community. This endeavor, announced by President Peters and UBAC, sought innovative proposals to potentially utilize funding allocated to WOU. The committee requested brainstorming and idea submissions via a survey, emphasizing criteria such as generating revenue, enhancing WOU's vision, focusing on student needs, boosting enrollment, and fostering engagement across the university. UBAC has received over 75 diverse responses from students, faculty, and staff, primarily aligning with Tranche 1 project objectives. These insights will be instrumental in guiding Tranche 2 funding decisions and further advisement by UBAC.

Western Oregon University: Center for Teaching and Learning (CTL)

The Center for Teaching and Learning (CTL) at Western Oregon University plays a crucial role in supporting faculty development and enhancing teaching quality. The investment aims to expand CTL's initiatives, focusing on professional development, best practices in teaching, and enhancing student learning outcomes. The center will work toward creating inclusive and high-quality courses, ensuring courses meet quality rubrics, and equipping faculty with the necessary tools for diversifying and decolonizing the curriculum.

Project Spending Plan & Timeline

Western Oregon University has allocated \$194,500 of its Tranche 1 financial sustainability funds for this initiative. The funds will be used to expand existing initiatives, develop new resources, and implement assessment mechanisms.

The timeline for these developments will align with the university's ongoing commitment to continuous faculty development.

Impacts on Operating Budget

This initiative is a combination of a cost saving and revenue generating measure. By enhancing teaching quality and student learning outcomes, the university expects to improve student retention and satisfaction, leading to potential long-term financial benefits and revenue.

Measuring Success

Success for this project will be measured by the implementation of quality rubrics, improvements in teaching effectiveness, faculty engagement in professional development, and enhanced student learning outcomes.

Campus Engagement

The University Budget Advisory Committee (UBAC) of Western Oregon University, representing faculty, staff, and administration, has successfully concluded an extensive outreach initiative with the WOU community. This endeavor, announced by President Peters and UBAC, sought innovative proposals to potentially utilize funding allocated to WOU. The committee requested brainstorming and idea submissions via a survey, emphasizing criteria such as generating revenue, enhancing WOU's vision, focusing on student needs, boosting enrollment, and fostering engagement across the university. UBAC has received over 75 diverse responses from students, faculty, and staff, primarily aligning with Tranche 1 project objectives. These insights will be instrumental in guiding Tranche 2 funding decisions and further advisement by UBAC.

Portland State University: Center for Internship, Mentoring and Research (CIMR)

This project advances the development of the Center for Internship, Mentoring and Research (CIMR), a university-level center overseen by RGS, as a central hub for the consolidation, coordination, and support of undergraduate research and internship experiences at PSU.

Building on established infrastructure and expertise, the CIMR will serve three complementary functions: 1) Program support – providing efficient administrative and programmatic support for multiple interdisciplinary research training and internship programs; 2) Student services – promoting awareness, preparation, access, and participation of undergraduates in research and internship programs; and 3) Faculty catalyst – assisting faculty and workforce partners in proposing, funding, and providing new research opportunities and internship programs for PSU students.

The investment in the CIMR is intended to support and increase enrollment at PSU in multiple ways. First, undergraduate research and internship programs improve student retention, academic success, and career preparation, and participants in CIMR programs had year-to-year retention rates of 89-91% from 2020-2022 and were more likely to graduate in four years than their peers. Second, CIMR programs bring external resources that fund student stipends, wages, and tuition remissions. Third, some CIMR programs are bridge programs with planned transfer pathways to PSU, and opportunities through CIMR programs may attract students to enroll at PSU. Finally, CIMR programs support students in preparing for graduate school, with participants frequently entering graduate programs at PSU.

As a result of this effort, PSU hopes to achieve widespread recognition of CIMR as the central hub for externally funded undergraduate research and internship programs (e.g., the de facto office of undergraduate research). PSU seeks to have the CIMR be an example of an effective centralized shared services model that can enhance service provision and improve student

access to valuable career development experiences. PSU also seeks to demonstrate the potential for a high return on investment of institutional resources in core CIMR functions.

Project Spending Plan & Timeline

The total budget for this project is \$100,000. The project will fund FTE of existing CIMR personnel and new temporary student employees to work on specific deliverables (e.g., program operations resource library and partnership structure; student services plan for office of undergraduate research; grant-writing templates to support faculty proposal development; and website redesign). The timeline for the project is to conclude spending and complete deliverables by June 30, 2024.

Impacts on Operating Budget

This project is intended to result in both cost-savings and revenue generation by expanding CIMR's successful model for supporting research and internships programs at PSU.

This project will promote PSU's financial sustainability in three ways:

- 1) **Program Efficiencies:** CIMR's consolidated service-center model operationally and programmatically supports multiple externally funded STEM research training and internship programs with shared staffing, collaborative programming, and joint events and services.
- 2) **Student Retention:** CIMR's programs engage historically underrepresented students in culturally responsive mentored research and internship experiences that improve retention, academic success, and career preparation.
- 3) **External Funding:** CIMR's infrastructure supports faculty in proposing and implementing externally funded research and internship programs for undergraduates.

Measuring Success

Short-term success for this project will be assessed by completion of the proposed deliverables and two other indicators of progress: 1) the number of research/internship programs choosing to collaborate with CIMR; and 2) the number of grant proposal submissions supported by CIMR. Longer term success will be assessed through: 1) the growth of research/internship opportunities for undergraduates; 2) the number of students engaging with CIMR and CIMR programs following its relocation into the remodeled VSC building; and 3) the sustainability of CIMR infrastructure and capacity.

Campus Engagement

The evolution of the CIMR has been shared with students through major events hosted by CIMR (Summer Research Academy, Summer Research Symposium) as well as class information sessions and student newsletters. The project has been shared with faculty and staff through a series of meetings with the leadership of affiliated research and internship programs as well as colleagues at partner institutions (Clackamas Community College, Clark Community College, Portland Community College, Western Oregon University).

Workforce & Economic Development Projects

Oregon Institute of Technology: Workforce, Community, and Student Needs Assessment

Like all of Oregon's public universities, when Oregon Tech better understands its audiences, it can better leverage value propositions to increase engagement and enrollment. Better understanding market trends and audience expectations and needs also allows the university to create academic and engagement opportunities tailored to prospective student and industry needs, resulting in increased engagement, enrollment, and an improved university reputation.

To this end, Oregon Tech will seek to increase enrollment by utilizing financial sustainability funds to improve the college's understanding of market, prospective student, and workforce needs through a comprehensive needs assessment.

Oregon Tech will undergo a comprehensive, research-based process to better understand the needs of business, industry, state workforce, and Oregon students in order to tailor its degree programs and offer appropriate student services. As part of this process, Oregon Tech will:

- Invest in a market analysis study focused on Oregon's workforce needs in the STEM and healthcare fields, with a focus on micro-credentialing, badging, continuing education, and certificate programs.
- Engage in conversations with employers and community leaders.
- Conduct research to review current market conditions and understand the unmet educational needs of Oregon students to develop a strategic enrollment growth plan.

Oregon Tech plans to accomplish this by deploying surveys, hosting focus groups, and interviewing stakeholders, including but not limited to: dual credit students, traditional students, transfer students, non-traditional students, stopped-out students, STEM-H industry professionals, community leaders, and university supporters.

With this Workforce, Community, and Student Need Assessment, Oregon Tech hopes to achieve a better understanding of the workforce and educational needs landscape across Oregon.

Project outcomes:

- To gain an understanding of the educational and workforce needs of students, the state of Oregon, and the communities surrounding Oregon Tech campuses.
- To better understand how Oregon Tech can more effectively conduct student outreach and marketing about both the university and individual programs for the purpose of growing enrollment and meeting the educational needs of Oregon students.

With this information, the university can determine how to best engage with and serve Oregon students and other stakeholders, with a focus on the regions below:

Klamath Falls:

- STEM-H workforce needs assessment for urban and rural areas.
- Brand awareness, reputation, and value proposition and tuition survey.
- Willingness to commute or relocate and modality survey.
- **Result:** Tailor academic offerings to improve performance in this market and increase enrollment and retention at the Klamath Falls campus and online to serve rural Oregon.
- **Result:** Increase professional development opportunities for students at the Klamath Falls campus to meet workforce needs and prepare career-ready graduates.

Portland-Metro:

- STEM-H workforce needs assessment for urban and rural areas.
- Brand awareness, reputation, and value proposition and tuition survey.
- Willingness to commute or relocate and modality survey.
- **Result:** Tailor academic offerings to improve performance in this market and increase enrollment and retention at the Portland-Metro campus through in-person, hybrid, and online degree and certificate programming.
- **Result:** Increase professional development opportunities for students at the Portland-Metro campus to meet workforce needs and prepare career-ready graduates.

Medford:

- STEM-H workforce needs assessment for urban and rural areas.
- Brand awareness, reputation, and value proposition and tuition survey.
- Willingness to commute or relocate and modality survey.
- **Result:** Determine how to best engage with this market and to meet regional workforce needs through degree and certificate programs.
- **Result:** Determine whether to enter this market with a standalone brick and mortar location or to seek location partnership with another institution or industry organization.
- **Result:** Based on determination, seek investment for a Rogue Valley location or determine how current or new traditional or short-term offerings can be tailored to meet this audience where they are.

Willamette Valley:

- STEM-H workforce needs assessment for urban and rural areas.
- Brand awareness, reputation, and value proposition and tuition survey.

- Willingness to commute or relocate and modality survey.
- **Result:** Determine how to best engage with this market and to meet regional workforce needs through degree and certificate programs.
- **Result:** Determine whether to enter this market with a standalone brick and mortar location or to seek location partnership with another institution or industry organization.
- **Result:** Based on determination, seek investment for a Willamette Valley location or determine how current or new traditional or short-term offerings can be tailored to meet this audience where they are.

State of Oregon/rural Oregon:

- STEM-H workforce needs assessment for urban and rural areas.
- Brand awareness, reputation, and value proposition and tuition survey.
- Willingness to commute or relocate and modality survey.
- **Result:** Tailor academic offerings to align with urban and rural workforce needs and develop programming to deliver courses to meet Oregon residents where they are.
- **Result:** Increase in certificate, badging, etc., short-term programs to generate enrollment and meet urban and rural workforce needs throughout the state.

Project Spending Plan & Timeline

2023	Action	Cost
November	Draft RFP	
December	Publish RFP	
2024		
January	Award RFP and begin discovery phase	
February	Complete discovery phase and begin research phase	
March	Research, Klamath Falls and rural Oregon	\$50,000
April	Research, Portland-Metro	\$50,000
June	Research, Medford	\$50,000
July	Research, Willamette Valley	\$50,000
August	Analyze and publish results	
September	Begin initiative development in response to results	

The total budget for this project is expected to be \$250,000.

Impacts on Operating Budget

Oregon Tech's Workforce, Community and Student Need Assessment is expected to result in both cost-saving and revenue generating measures. The project will generate more revenue for Oregon Tech by:

- Better understanding Oregon's workforce needs and in response developing industry aligned traditional and short-term degree and certificate programs, therefore increasing enrollment and completion.
- Better understanding the needs of prospective students in STEM-H degree and certificate programs and in response delivering courses that meet these students where they are, therefore increasing enrollment and retention.
- Better understanding state and regional marketing, outreach, and recruitment needs, and in response delivering more effective marketing, outreach, and recruitment efforts, therefore increasing efficiency, and reducing waste, and increasing engagement, including information requests, tour requests, application completion, and enrollment.
- Increasing brand and value proposition awareness to increase audience engagement, including information requests, tour requests, application completion, enrollment, industry interest and partnership, and financial support.

Measuring Success

Success for this project will be measured by an:

- Increase in university information and campus tour requests.
- Increase in efficiencies and maximization of cost savings through better informed decision-making that reduces marketing, outreach, and recruitment costs while increasing degree and certificate enrollment.
- Increase in development of and enrollment in programming pathways for traditional, non-traditional, transfer, and stopped out students, as well as industry professionals seeking to skill up.

Campus Engagement

This project has been shared with students, faculty, and staff through an online survey and in an all-university forum held at the Oregon Tech Portland-Metro campus and virtually via Teams.

Portland State University: Clean Industry Hub

Through this program, PSU seeks to establish a long-term funding model for supporting the university's position as a clean industry convener and project catalyst in the Portland metro

region. This will allow PSU to be at the center of future grant writing efforts on clean industry topics, where PSU has considerable faculty and student capacity and interest. By being at the center of this effort, PSU will create a systemic and long-term approach for student and faculty funding to engage in research and career readiness in the clean energy industry.

Overall, the Clean Industry Hub seeks to accomplish the following:

1. Acquire matching funds from the City of Portland to support PSU's role as a convener and project activator around clean industry development in Portland.
2. Position PSU as a central actor in the clean industry movement in Portland (through marketing, relationship development and project/program acquisition).
3. Leverage additional resources through the Clean Industry Hub to support career development for PSU students and strengthen PSU's position as a regional economic development partner.
4. Submit \$5 million in external funding applications (that involve funding for PSU researchers, staff and/or students) around clean industry projects in collaboration with government, business, and community partners.
5. Secure additional "base" funding that allows PSU to continue to convene and catalyze clean industry projects and collaborations in the region.

Project Spending Plan & Timeline

The total budget for this project is \$261,000: \$111,000 in direct costs from the City of Portland (\$150,000 initial grant, minus 26% overhead rate) and \$150,000 from the Tranche 1 sustainability funding to leverage the matching startup funds from the city.

The project is broken up into three phases, which also determine the project spending.

Phase 1: Predevelopment: August 2023 – January 2024: \$40,000

Funding in this phase goes mostly to staff at PSU to build a leadership team, an advisory board, initial grant writing and development of a project activation strategy.

Phase 2: Project activation: January 2024 – January 2025: \$170,000

Funding in this phase is allocated for ongoing staff engagement to run the leadership team, advisory board, write grants and administer projects. Funding in this round is also reserved for external contracts and direct faculty and student support to engage in collaborative projects and grants. The staff will also be involved in evaluation activities that gather data to make the long-term case for PSU's role in the clean industry work.

Phase 3: Expansion and diversification: January 2025 – May 2025: \$41,000

Funding during this phase will go to staff to focus on closing out projects and grants and engaging the leadership team and advisory board around the long-term model for the clean industry hub.

Impacts on Operating Budget

The goal for this project is to establish a funding model that provides ongoing (long-term) funding for PSU to play the regional convening and catalyzing role for clean industry work in the region. This will be externally funded. Assuming this role will allow PSU staff to develop projects and grants that greatly expand PSU's engagement and funding to support research and workforce development in the clean industry sector in Portland.

Measuring Success

Success for this project will be measured in two ways. First, by achieving base funding that provides modest, but long-term support for PSU's role as a clean industry convener and catalyst. Second, by achieving success in receiving three grants (in partnership with businesses, government, and community-based organizations) that provide ongoing financial support to PSU faculty and staff for research, creative activities, and career readiness.

Campus Engagement

PSU has initiated grassroots conversations about the project with faculty and staff and is actively working on a joint press release with the City of Portland to share the news about the program more broadly, including ways to engage. On November 30, 2023, PSU hosted an industrial decarbonization faculty and staff convening to share the work with faculty and students who had identified interest in the topic area and to workshop ideas for further involvement and engagement in the project.

Western Oregon University: Doctorate in Occupational Therapy Program

The investment in Western Oregon University's Occupational Therapy Doctorate (OTD) Program is focused on enhancing the educational experience through the acquisition of a digital cadaver unit. This state-of-the-art tool will provide OTD students with an immersive and interactive learning experience, addressing immediate educational needs and generating long-term benefits. The initiative includes integrating the digital cadaver into student recruitment events, improving program quality, enhancing student success, and boosting the program's reputation.

Project Spending Plan & Timeline

WOU has allocated \$195,500 for this initiative, with \$102,130 earmarked for purchasing the Anatomage 3D digital cadaver table. The digital cadaver comes with a four-year extended warranty, including software upgrades and tech support. The long-term financial impact is expected to be less than the annual costs associated with traditional cadavers, factoring in the reduced need for specialized storage, environmental control, and supervision.

Impacts on Operating Budget

The digital cadaver will enhance WOU's OTD program's educational quality, leading to improved program reputation, increased enrollment, and substantial revenue generation, positively impacting the university's finances. The enriched program is projected to generate significant revenue, estimated at \$3.4 million by the third year, covering the initial investment and providing financial sustainability for further development.

Measuring Success

Success for this program will be measured by the enhanced quality of the educational experience, increased enrollment in the OTD program, student satisfaction, and revenue generation.

Campus Engagement

The University Budget Advisory Committee (UBAC) of Western Oregon University, representing faculty, staff, and administration, has successfully concluded an extensive outreach initiative with the WOU community. This endeavor, announced by President Peters and UBAC, sought innovative proposals to potentially utilize funding allocated to WOU. The committee requested brainstorming and idea submissions via a survey, emphasizing criteria such as generating revenue, enhancing WOU's vision, focusing on student needs, boosting enrollment, and fostering engagement across the university. UBAC has received over 75 diverse responses from students, faculty, and staff, primarily aligning with Tranche 1 project objectives. These insights will be instrumental in guiding Tranche 2 funding decisions and further advisement by UBAC.

Portland State University: Sustainable Fashion and Game Design Degree Exploration

PSU has allocated \$200,000 to its School of Art + Design to develop curriculum related to student interest in game design and sustainable fashion. Funds will be used to develop and run new coursework related to the two areas of study in consultation with industry experts in AY 2023/24. Funds will also be used to upgrade existing lab facilities to be able to accommodate the new curriculum and anticipated enrollment increase.

Project Spending Plan & Timeline

Fall 2023: Develop new program proposals for game design/sustainable fashion and purchase equipment needed to run coursework

Winter 2024: Pilot courses related to game design/sustainable fashion and develop partnerships with potential high schools, community colleges, and Technical and Regional Universities

Spring 2024: Continue pilot courses related to game design/sustainable fashion and develop recruitment materials for fall 2024

Impacts on Operating Budget

Both of these programs intend to increase enrollment in the School of Art + Design by creating new curricula around established student interests in emerging fields in creative industries. The course pilots will serve as a revenue-generating method of testing the viability of the new curriculum. Developing partnerships with high schools, community colleges, Technical and Regional Universities, and industry will help establish important groundwork for self-sustaining programs.

Measuring Success

Success for this program will be measured through full enrollment in new coursework related to game design and sustainable fashion by fall 2024.

Campus Engagement

This project has been shared with students, faculty, and staff through departmental newsletters.

Administrative Services & Efficiencies Projects

Southern Oregon University: Core Information System Replacement – Finance/HR (CISR-F/HR)

SOU is using its full share of Tranche 1 funding to transform its Core Information System, allowing the university to both reduce massive ongoing annual operational costs, and streamline operational processes. This project involves SOU moving from its 30+ year old legacy software with significantly outdated technology to modern technology that is scalable for the future. The software conversion requires review of business functions that have grown convoluted over time, then reengineering systems to support those functions more efficiently. In addition to replacing the core software system, SOU will jettison a patchwork of systems that have been added over the years to fill in, augment or improve the increasing limitations of the legacy software.

Tranche 1 financial sustainability funding is supporting SOU in transitioning Finance, and HR/Payroll systems, including the cost of an implementation partner to carefully plan the transition and conduct thorough testing before launching the new system. These steps are critical not just to ensure a successful launch; they are also building the software foundation that will carry SOU forward for several decades. The new system is set to go live for HR, Finance and Payroll systems on January 1, 2024.

Project Spending Plan & Timeline

PLAN – Summer Term 2022:

- Initiate project

- Start planning and examine current & future states
- Build system foundation
- Introduce change management
- Begin leadership engagement

ARCHITECT – Winter Term 2023:

- Host Foundation Alignment Sessions
- Plan for and navigate large-impact changes

CONFIGURE & PROTOTYPE – Spring/Summer Term 2023:

- Confirm SOU comfort level with the system
- Build and test the system
- Convert data to Workday
- Plan Employee Training
- Start C/SR Network

TEST – Fall Term 2023:

- Complete End-to-End Testing of the system
- Develop a transition plan from Banner to Workday
- Develop Training Materials
- User Readiness Review

DEPLOY – Fall 2023/Spring 2024 Term:

- Train Employees
- Go-Live!
- Convert Data
- Implement Sustainability Plan

Impacts on Operating Budget

This transition, together with the CISR-Student replacement that SOU will complete using Tranche 2 financial sustainability funds, will result in direct savings of approximately \$700,000 - \$900,000 *per year* ongoing. In addition, as staff learn the streamlined system, SOU anticipates reduced staff time will be needed to accomplish routine tasks that have become onerous under the current patchwork of information systems. Those savings in staff time are in addition to the above cost savings.

With a 56% increase in federal mandates over just a five-year period¹, and recurring staff and faculty cuts over the past two decades, these savings are key to making current staffing levels sustainable. Transforming SOU’s Core Information Systems has real and significant long-term

¹ *Recalibrating Regulation of Colleges and Universities, Report of the Task Force on Federal Regulation of Higher Education* - <https://www.acenet.edu/news-room/Documents/Higher-Education-Regulations-Task-Force-Report.pdf>, p. 7.

cost savings, and helps the university make the most effective use of its most valuable resource: its people.

In addition, by leading the public universities in making the transition away from Banner, SOU is providing cost savings for its sister universities as they follow. SOU has committed to sharing with its sister institutions what it learns in the system transformation process.

Measuring Success

The central (and very direct) metric for this project is cost savings. However, SOU will also measure its success directly and indirectly through an analysis of time management and student/faculty/staff workload and morale. SOU anticipates that this technology transition will create a streamlined and modern architecture which will ease the burden on all team members who currently operate in an archaic, paper-based 20th century system.

Campus Engagement

The Core Information System Replacement was thoroughly vetted with SOU students, faculty, and staff over the course of a year before the university committed to the project. Following SOU's Chief Information Officer's presentation of the project to the President's Cabinet, input was sought from the university's Faculty Senate, Staff Assembly, and Student Government. During the most recent round of significant budget cuts on SOU's campus, the CISR project was discussed along with other cost savings ideas in an extensive campus conversation involving multiple all-campus meetings. Now embedded in the SOU Forward plan for sustainability, supporting this work with the state's financial sustainability investment was a clear choice and has been discussed with SOU's campus via shared governance structures, in meetings with campus union leadership, and in the university's fall all-campus meeting.

Western Oregon University: Salary Study

The Salary Study/Internal Ops initiative at Western Oregon University is focused on conducting a comprehensive salary study to ensure equitable compensation for faculty and staff. Throughout the duration of this project, an external team will carry out an in-depth analysis of current salary structures, comparing them with peer institutions to identify areas needing adjustment. The study aims to address potential inequities and disparities in compensation, thereby improving faculty and staff motivation and productivity.

Project Spending Plan & Timeline

The university has allocated \$110,000 for this initiative. The budget covers the cost of the external team conducting the study, data collection and analysis, implementation of new compensation packages, and communication with faculty and staff about the changes. The timeline for the study and subsequent implementation of its findings will be structured to

efficiently address compensation concerns and improve the university's talent retention and attraction.

Impacts on Operating Budget

By ensuring competitive and equitable compensation, the university expects to improve talent retention and reduce the costs associated with staff turnover, such as recruitment and training. Additionally, being recognized as a fair employer may attract top-tier faculty and staff, potentially leading to increased enrollments and research funding opportunities. While not directly aimed at increasing enrollment, the improved reputation of the university as an equitable employer resulting from this project could indirectly attract more students and enhance research opportunities, in addition to improving talent attraction and potentially increasing enrollment.

Measuring Success

Success for this project will be measured by the effective implementation of equitable salary structures, reduced staff turnover rates, and enhanced reputation as a fair employer. The university will also track improvements in faculty and staff satisfaction and engagement.

Campus Engagement

The University Budget Advisory Committee (UBAC) of Western Oregon University, representing faculty, staff, and administration, has successfully concluded an extensive outreach initiative with the WOU community. This endeavor, announced by President Peters and UBAC, sought innovative proposals to potentially utilize funding allocated to WOU. The committee requested brainstorming and idea submissions via a survey, emphasizing criteria such as generating revenue, enhancing WOU's vision, focusing on student needs, boosting enrollment, and fostering engagement across the university. UBAC has received over 75 diverse responses from students, faculty, and staff, primarily aligning with Tranche 1 project objectives. These insights will be instrumental in guiding Tranche 2 funding decisions and further advisement by UBAC.

Western Oregon University: Banner Optimization for HR Practices

The initiative to optimize Banner for Human Resources practices at Western Oregon University is aimed at enhancing the functionality of the current system. The investment will improve the management of personnel records, payroll, benefits, recruitment, and performance evaluations. By fully utilizing the Banner system, the university expects to achieve improved efficiency in HR practices, cost savings, and enhanced data-driven decision-making, contributing to long-term financial sustainability.

Project Spending Plan & Timeline

Western Oregon University has allocated \$100,000 for enhancing the Banner system. The funds will be used to upgrade and optimize the current system, ensuring its full utilization in HR practices. The timeline for the implementation of these upgrades will be aligned with the university's strategic plan for improving operational efficiency.

Impacts on Operating Budget

Optimizing the Banner system is expected to result in cost savings by improving HR operational efficiency, reducing the need for additional resources, and enabling more effective management of human capital.

Measuring Success

Success for this project will be measured by the increased efficiency in HR processes, cost savings achieved, and improved accuracy and accessibility of HR data for decision-making.

Campus Engagement

The University Budget Advisory Committee (UBAC) of Western Oregon University, representing faculty, staff, and administration, has successfully concluded an extensive outreach initiative with the WOU community. This endeavor, announced by President Peters and UBAC, sought innovative proposals to potentially utilize funding allocated to WOU. The committee requested brainstorming and idea submissions via a survey, emphasizing criteria such as generating revenue, enhancing WOU's vision, focusing on student needs, boosting enrollment, and fostering engagement across the university. UBAC has received over 75 diverse responses from students, faculty, and staff, primarily aligning with Tranche 1 project objectives. These insights will be instrumental in guiding Tranche 2 funding decisions and further advisement by UBAC.

Oregon Institute of Technology: Canvas Impact Tool

Oregon Tech will utilize a portion of its Tranche 1 financial sustainability funds to acquire the Canvas Impact Tool, an analytics system that helps the institution make decisions around additional student support such as additional tutoring. The Canvas Impact Tool can also help focus the department around faculty/student interventions in specific areas that would positively impact student success and retention, as well as faculty engagement and communication with students.

By optimizing analytics and Oregon Tech's ability to use them in a real time environment, the university will improve term to term retention of students across both online and on-campus programs and coursework as all courses use Canvas regardless of delivery modality. This project should see an increase in continuing student retention and could also reduce time to graduation. Better student retention statistics and decreased time to graduation should also help Oregon Tech recruit more students. The tool is anticipated to have a direct and positive retention impact.

Project Spending Plan & Timeline

The cost to support the project is \$15,876 which should be spent by December 15, 2023. The implementation timeline is estimated at two weeks and can be part of Oregon Tech's ongoing Canvas training and implementation workflow.

Impacts on Operating Budget

As both a cost-saving and revenue generating measure, this project will help Oregon Tech retain students with improvements to student success and student course and program outcomes. It will have a minimal impact on the long-term operating budget.

Measuring Success

The success of this project will be measured by improved retention and graduation rates, and improved student satisfaction, as well as more efficient use of staff and faculty time.

Campus Engagement

This project has been vetted by Oregon Tech's Retention subcommittee and shared with the Oregon Tech sustainability team. This initiative was also shared with the university community, including students, staff, and faculty during a public forum and in a campus wide email. This project was informed by feedback from a Qualtrics survey and feedback during office hours with institutional leaders.

Oregon Institute of Technology: Strategic Realignment of Financial and Budget Software Solutions

Oregon Tech's strategic realignment of its finance system and budget software solutions will expedite reporting, streamline resource allocation, improve access for campus users, and bolster efficiency throughout the college's Klamath Falls and Wilsonville campuses. Implementation of a budget module will yield improved resource management and financial data accessibility, benefiting budget owners, faculty, and classified staff at Oregon Tech. The transition back to Banner Finance will notably diminish manual processes, and foster alignment with other Oregon universities.

This consolidation initiative is poised to yield annual savings exceeding \$125,000 through the elimination of redundant software subscriptions. Additionally, it will augment Oregon Tech's financial modeling and forecasting capabilities, positioning the university for the adoption of a more performance-driven budget strategy, and ultimately safeguarding resources for the benefit of Oregon Tech's students and faculty.

Project Spending Plan & Timeline

The project timeline for the realignment of Oregon Tech's financial software and budget software solutions is dependent upon consultant feedback. The Request for Proposal (RFP) process is anticipated to span 8-12 weeks, followed by an estimated project window of 12-18 months.

Oregon Tech has budgeted \$350,000 of its Tranche 1 financial sustainability funding for this project. The budget and reporting software implementation will run in parallel, aligning with Banner re-implementation and informed by recommendations of the consultant.

Impacts on Operating Budget

The direct cost savings in software subscriptions resulting from this project will be \$125,000 annually. In addition, the realized net time savings resulting from the mitigation of inefficiencies in manual processes are anticipated to net 2,500 hours, equating to a reduction of over \$125,000 in labor costs.

This project will streamline operations by eliminating redundancies, simplifying reporting processes, and enhancing accessibility to financial resources. Post-implementation, the optimized labor efforts can be strategically reallocated to address other prioritized support needs. It also strengthens budget authority accountability and facilitates faster decision-making.

The re-implementation of Banner aligns Oregon Tech with other Oregon institutions, potentially fostering synergies in training and reporting, as well as possible future ERP migrations. Alternatively, it positions Oregon Tech to explore future ERP solutions without the expense and difficulty of migrating from two systems. This transition promises substantial reductions in implementation costs and time whenever the university is ready to implement a new ERP. This move could also significantly moderate the need to grow Oregon Tech's FTE for administrative support.

Finally, Oregon Tech will establish a more robust system to mitigate risks associated with personnel turnover. The current system demands intensive management, and the departure of key financial team members could pose a substantial threat to critical financial operations and compliance due to the steep learning curve involved. The proposed solution aims to ensure stability and continuity in financial processes in the face of organizational changes.

Measuring Success

Success for this project will be evaluated through several key metrics:

1. **Finance Software Cost Savings:** The project's success will be measured by the discernible reduction in costs associated with finance software, reflecting an efficient utilization of resources and improved financial management.

2. **Increase in Bandwidth for Budget and Finance Office:** Success will also be evidenced by an augmented operational capacity within the budget and finance office. This could manifest through the absorption of expanded duties or possible moderation in staffing through attrition, resulting in an increased bandwidth for strategic financial activities. Regular operating duties will become less manual, and those efforts would be redirected to more proactive financial management without the need to add staffing.
3. **Campus Satisfaction Feedback on Access to Financial Data:** Another crucial metric involves assessing campus satisfaction through feedback on the ease of access to and utilization of financial data. Positive responses affirming improved accessibility and end-user modality will indicate the project's success in enhancing the overall financial information dissemination and utilization process.

Campus Engagement

This project has been shared with Oregon Tech students, faculty, and staff by soliciting feedback through a Qualtrics survey in addition to discussion at a campus-wide open forum and the university's Fiscal Operations Advisory Council. Institutional leadership also held office hours to solicit additional feedback on the initiative.

Portland State University: Generative AI for Graduate School and Enrollment Management

PSU will use \$60,000 of its Tranche 1 financial sustainability funds to explore integrating generative artificial intelligence (AI) with its graduate school admissions page in order to increase prospective student engagement in graduate admissions. By adopting an AI chatbot for admissions, PSU expects to increase prospective student engagement, leading to more applications and enrollment. The use of the AI chatbot will also free up staff time currently occupied with answering routine enrollment questions.

Project Spending Plan & Timeline

Fall 2023: Identify an AI vendor and purchase AI (\$20,000)

Winter / Spring 2024: Hire a GAA to assist with AI training and integration (\$23,256)

Spring 2024: AI Consultant, Training, and/or Professional Development for Grad School Staff on AI (\$16,744)

Impacts on Operating Budget

This project will serve as both a cost-saving and revenue generating measure through freeing up staff time and increasing graduate student enrollments. Moving forward, adding the AI chatbot to the graduate admission website will only require \$6,500.

Measuring Success

Success for this project will be measured through the successful implementation of the AI chatbot on PSU's graduate admissions website by June 2024 and through benchmarking using the number of applications and Google analytics for traffic on the graduate admissions webpages.

Campus Engagement

This project has been shared with PSU's AI Taskforce, Office of Information Technology, and Undergraduate Admissions. Once implemented, it will be widely announced to the university's faculty and students through Currently and the Graduate School and Graduate Admissions newsletters.

Portland State University: PSU-PCC Co-Enrollment Platform

This project aims to discover a sustainable mechanism to share data and applications between Portland Community College (PCC) and Portland State University (PSU) in an attempt to increase the university's transfer population and gain actionable insights.

Through a unified gathering of stakeholders, PSU aims to design a solid, feasible, maintainable, and effective solution that meets broad PSU needs, including recruitment, admission, co-admission, transfer transition, and continued PSU enrollment/degree progress, and most importantly, an ability to strengthen the advising partnership so PSU's academic advisors can work more closely on a given student's situation and pathway. Additionally, this project aligns with and supports all of the HECC work related to the Major Transfer Maps and improved transfer pathways.

PCC sends PSU the largest number of transfer students of all Oregon community colleges. The Aspen Institute notes that 80% of community college students intend to attend a four-year institution and earn a bachelor's degree, yet only 14% of those students achieve this goal of degree attainment. PCC and PSU do not have a formal data sharing agreement that allows for the institutions to treat these students as truly shared students. Increasing collaboration with PCC by creating a data sharing agreement could help PCC students experience PSU as an extension of PCC and transfer with more ease. This agreement would also remove blind spots at both institutions: currently, PSU has no insight into PCC students that might begin their academic careers intending to transfer but never reach the point of applying, and PCC has no detailed insight into how its PSU transfer students fare as they continue their studies. This continuity of data will lead PSU and PCC to innovative and actionable insights that will inform and improve retention and persistence efforts at both institutions.

Project Spending Plan & Timeline

Budget Item	Estimated Total
<i>Project Manager OAA</i>	<i>\$24,250</i>
<i>Project Manager OIT</i>	<i>\$34,250</i>
<i>BI-Team Support</i>	<i>\$24,250</i>
<i>PSU OIRP Data Analyst</i>	<i>\$16,000</i>
<i>Software/Technical Solutions</i>	<i>\$24,250</i>
<i>Supplies/Equipment</i>	<i>\$5,000</i>
<i>Contract with PCC to support IT and IR</i>	<i>\$70,000</i>
<i>Hosting/Events</i>	<i>\$2,000</i>
<i>Other</i>	<i>\$0</i>
Total Budget / Cost	\$200,000

*Requesting that \$50K of this budget be carried forward to next fiscal year.

PSU plans to have the data sharing agreement and framework in place and resources are aligned for implementation by the end of fall 2024.

Impacts on Operating Budget

PSU anticipates that the discovery of a shared data repository related to student information will allow the university to engage earlier with students co-enrolled in PSU and PCC and offer opportunities for enhanced support to transfer students. This could increase PSU’s transfer population, which in turn would increase revenue.

Measuring Success

This project is largely a discovery of the ways that more robust data and applications can be shared with students between PSU and PCC. At the conclusion of the project, PSU intends to create an action plan and align resources to implement changes to PSU systems and practices to share data with PCC.

Develop a formal partnership between PCC and PSU that extends beyond Admissions: PSU currently has an excellent relationship with PCC through the Transfer and Returning Student Center (Randi Harris, Director) as well as the academic deans in several PSU schools and colleges. This project would elevate the partnership to the institutional level.

Find a mechanism for sharing student data and applications between the institutions: PSU expects successful discovery of a shared data repository related to student information would allow the university to engage earlier with students co-enrolled in PSU and PCC and offer opportunities for enhanced support to transfer students. This could increase PSU's transfer population, which in turn would increase revenue.

Improve the accuracy of PSU's enrollment modeling: A better insight into PCC's student population (in particular, the numbers of PCC students enrolled in AAOT/ASOT programs) would aid in PSU's enrollment modeling.

Success for the project will be measured by having the data sharing agreement and framework in place and all resources aligned for implementation by the end of fall 2024.

Campus Engagement

PSU has sent formal invitations to potential project team members, including PCC members. Once the kickoff meeting takes place, PSU plans to share the project with campus stakeholders via status reports, newsletters, and the PSU website.

Portland State University: InnovAlte Research

PSU will utilize \$20,000 of its Tranche 1 financial sustainability funds to transform the university's research landscape by leveraging generative AI to streamline administrative tasks and foster interdisciplinary collaborations.

The InnovAlte research program is a strategic initiative designed to integrate generative Artificial Intelligence (AI) into grant seeking and research administration processes. Desired outcomes for the project include increased AI proficiency, reduced administrative burden, improved research administration efficiency, ethical AI practices, broadened AI knowledge sharing, positive AI perception, and expanded AI tool utilization. These outcomes are expected to streamline workflows, enhance productivity, foster innovation in research and administration, and positively impact the budget by reducing time and resources required for administrative tasks and grant seeking.

Project Spending Plan & Timeline

Most of the funds for this project will be expended between January 2024 and July 2024 to support the activities of the InnovAlte Research Academy, the InnovAlte Research Summit, and the PromptCrafters@PSU program.

Impacts on Operating Budget

The InnovAlte Research program primarily functions as a cost-saving measure by enhancing efficiency in research administration and grant seeking through the integration of AI technologies. By streamlining administrative processes and improving grant application success rates, the program aims to reduce the time and resources expended on these tasks. While not directly a revenue-generating initiative, the improved success in grant seeking could indirectly lead to increased funding for the university.

Measuring Success

Success for the InnovAlte Research program will be measured through several key metrics: increased AI proficiency among participants, reduced administrative burden, improved efficiency in research administration, adherence to ethical AI practices, enhanced AI knowledge sharing and collaboration, positive AI perception among faculty and staff, and expanded AI tool utilization across disciplines. These metrics will comprehensively assess the program's impact on research efficiency, innovation, and overall effectiveness.

Campus Engagement

Calls for applications for the InnovAlte Academy were sent out in December 2023. The program will be shared with students, faculty, and staff through university channels, meetings, and internal communications, including biweekly InnovAlte Bytes & Insights Sessions, where participants can share experiences and discuss AI applications, and an annual InnovAlte Summit, showcasing AI advancements and fostering community engagement. Additionally, the PromptCrafters@PSU program involves students in collaborative design sprints, directly engaging them in the initiative.

Portland State University: Virtual First Stop

Virtual First Stop (VFS) is a cross-divisional collaboration project to implement a shared set of tools and processes that simplifies the student's experience when seeking help, as well as the staff experience when providing support. These efforts will improve student wayfinding and operational efficiency by providing a single web portal where students can find answers to common questions, request assistance, and track their open requests. The resulting environment will create a net positive impact on PSU's operating budget by improving student persistence, and by using limited resources more efficiently.

This project will enhance PSU students' ability to find and receive support, providing a faster, and better service experience. This will reduce administrative barriers that cause stop-out and drop-out. Centralized data collection on service interactions will allow analysis to identify and reduce administrative barriers to improve student retention and persistence.

Project Spending Plan & Timeline

November 2023: Software selection and purchase (\$70,000)

January – June 2024: Training & Events (\$60,000)

January – June 2024: Implementation Consultants (\$70,000)

Impacts on Operating Budget

This project will allow for gross cost savings by providing centralized, modern digital tools for collaborating on student support and allowing units with redundant software the opportunity to abandon licenses to siloed systems in use across PSU's campus. It will also offer economies of scale by allowing PSU to concentrate its support, training, and integration resources, and by purchasing software licenses with bulk discounts. Modern tools and shared processes will result in faster and higher quality support for students, which will lead to increased student persistence and associated revenue.

Measuring Success

This project will be considered successful when the core student support units (Registrar's Office, Student Financial Services, Financial Aid, Office of Information Technology, and Advising and Career Services) are actively using the new tool set and have decommissioned their redundant systems. PSU will be able to see this success reflected in survey instruments such as the annual student experience survey and unit specific customer satisfaction surveys for specific transactions. The new set of tools will allow PSU to collaboratively establish shared baseline metrics, identify institutional bottlenecks, and consistently measure the success of future improvements.

Campus Engagement

A widespread announcement of this project has not yet been made, but core units have been actively engaged with the project since spring 2023. The discovery and planning phase concluded on December 7, 2023 with an announcement of findings and next steps at an in-service day for the core support units. Campus-wide communication and engagement will begin in January 2024.

Portland State University: Campus Utility Systems Study

Campus utility costs at PSU continue to increase by double digit percentages year over year. This study will examine how to reduce utility costs, move toward carbon neutrality, and improve overall reliability of PSU's utility system. The study will also look at transitioning the campus heating loop from natural gas to electricity or other sources, including the potential for on-site geothermal.

Project Spending Plan & Timeline

PSU has allocated \$200,000 for this study, which will be used to hire a consultant (already complete) and fund their work, with a completion date of June 2024.

Impacts on Operating Budget

This project will result in a preferred project to reduce PSU's long-term utility costs. PSU will use this study to create a funding path forward to implement the preferred project to begin the work of transitioning PSU's utility loop to reduce costs and environmental impacts.

Measuring Success

This study will provide the detail necessary to create a capital project to position PSU to seek local, state, and federal funds. Success for the project will include completing a successful study and moving forward with a capital project to implement the findings of the study.

Campus Engagement

As part of the project, PSU intends to share regular updates with students, faculty, staff, and other campus stakeholders.

Portland State University: Participatory Budgeting

PSU's campus community has indicated to university leadership that they would like to be more involved in budgetary decisions. This project will pilot a participatory budgeting tool for the campus that could be rolled out for larger university decisions.

Project Spending Plan & Timeline

Balancing Act Tool – \$7,000

Faculty Support – \$6,000

All funds will be spent by June 2024.

Impacts on Operating Budget

This project will help optimize current services by providing a way for the whole campus to be involved in budgetary decisions. Their feedback via the tool will be used to determine how best to allocate resources.

Measuring Success

By using this tool, PSU hopes that the campus community will feel more involved in budgetary planning decisions. As leadership will need to make some difficult budgetary choices, sharing

those options through this resource will allow others on campus a way to provide feedback on how PSU should proceed. Overall success of the project will be measured through the number of campus constituents using the tool and overall campus climate around budgeting.

Campus Engagement

PSU rolled out the tool at its November 6, 2023 Budget and Financial Sustainability Forum. At the forum, PSU’s faculty lead provided a short tutorial on how to use the tool. Over 200 people attended the forum and over 1,600 campus constituents used the tool to help the university prioritize projects for Tranche 2 financial sustainability funding.

Portland State University: Strategic Planning

Portland State University will use \$500,000 of its Tranche 1 financial sustainability funds to execute a strategic planning process to help PSU’s faculty, staff and students reaffirm the university’s mission, vision, and values, and set high-level goals, as well as shorter term goals to guide resource allocation. The strategic planning process will include analyzing secondary data, gathering input from the PSU and outside community, and drafting a dynamic strategic plan to guide investments moving forward.

The strategic plan will determine the following:

- The university’s primary mission, vision, values and high-level goals
- The external market it is striving to serve
- The value proposition the university offers to students, faculty, staff and community
- The shorter-term goals and milestones required to deliver on the value proposition
- A prioritized list of the key initiatives

This list of key initiatives will provide a roadmap for focusing PSU’s resources on what serves the strategic plan, which will further PSU’s financial sustainability. The plan will include a feedback loop to determine where investments are not netting the results they need.

In year two, PSU will begin implementation of the key initiatives outlined in the strategic plan, align the budget model to support them, and build accountability into each unit’s budget process. This will serve to further advance PSU’s financial sustainability.

Project Spending Plan & Timeline

Consulting	\$285,000
Project manager	\$45,500
Hosting, events	\$20,000
Economic impact study	\$80,000

Data	\$20,000
Travel	\$10,000
Document editing and production	\$19,500
Community participation (Stipends)	\$20,000
Other	\$0
Total	\$500,000

Most of these funds will be spent by the end of the 2023 fiscal year; however, some of the consulting costs will continue into next fiscal year as PSU finalizes the implementation of the strategic initiatives.

Impacts on Operating Budget

Strategic planning will help provide a guide for making budget decisions at PSU that are strategic and in alignment with the values of the university’s students, faculty, staff, and community. PSU anticipates that this project will help the university to reduce spending on projects that do not contribute to the strategic plan, as well as reduce costs for the recruitment of faculty and staff because turnover will be lower. In addition, the strategic planning project is expected to increase student retention. Every one percent increase in student retention increases tuition by \$1 million in the current year. Over the tenure of these students, the tuition impact is \$1.8 million. Successfully implementing retention initiatives with a strategic plan that provides great value for PSU’s students is a revenue generator.

Measuring Success

Success for this project will be measured through the delivery of a strategic planning document that is both approved by PSU’s Board of Trustees and supported by the majority of stakeholders. In addition, a successful outcome of this project will include a university budget that aligns with the strategic priorities outlined in the strategic plan.

Campus Engagement

PSU has a large strategic planning steering committee that has participated in the strategic planning process. PSU’s president has also shared information about the project with the entire PSU community through her blog. The university will seek additional input from the community on the project in the winter.

Tranche 2 Project Proposals Funding Breakdown

Eastern Oregon University	
Equity, Retention and Completion	\$2,300,000
Total	\$2,300,000
Oregon Institute of Technology	
Strategic Enrollment Management Plan	\$200,000
Coursedog Analytics	\$150,000
Online Campus Retention and Student Success Coaching	\$240,000
Ally Accessibility Software	\$25,000
Re-Enrollment Coaching and Strategic Communication to Stop Outs	\$180,000
First Year Experience Course	\$20,000
Inside Track Coaching Proof-of-Concept/Pilot Program for Career Coaching as an Embedded Part of the Admissions Process	\$100,000
Expanded Digital Communication to Dual Credit, Transfer, Returning and Re-Enrolling Students Through Motimatic	\$150,000
Workforce, Community, and Student Needs Assessment	\$870,000
Strategic Realignment of Finance Systems Subcommittee	\$250,000
Banner/Slate Integration Through Axiom Elite	\$115,000
Total	\$2,300,000
Portland State University	
Building More Effective Pathways into PSU	\$703,800
Renovation of a new University Welcome Center	\$500,000
On-Campus Housing Feasibility Study	\$450,000
Revitalized Summer Session	\$550,000
Supporting Current and Prospective Native American Students and Men of Color	\$335,000
Global Diversity, Equity, and Inclusion	\$240,000
Revitalizing General Education to Improve Student Retention	\$135,000
Partnering to Enhance Undergraduate Research Experiences	\$300,000
Vibrant Campus: Student Success Hub to Improve Wayfinding and Access	\$750,000
Helen Gordan Child Development Center: Preschool for All Self-Study	\$484,000
Game Design & Interactive Media Program	\$374,000
Career Readiness for Social Mobility in General Education	\$557,500
Unified Digital Ecosystem for Student Communications and Support	\$450,000
Merge ID Services Function into OIT	\$200,000
Operational Excellence	\$500,000
Recruitment Search/Support Pilot	\$350,000
Financial Sustainability Funding Project Management	\$120,000
Total	\$6,999,300
Southern Oregon University	
Student Centered Design and Accessibility – Outreach/Marketing/Branding/Website	\$500,000
Core Information System Replacement – Student Access & Accessibility (CISR-Student)	\$1,800,000
Total	\$2,300,000

<u>Western Oregon University</u>	
Operation Wolfstorm	TBD
Destination Western	TBD
Occupational Therapy Doctorate (OTD) Program	TBD
TBD Projects	TBD
Total	\$2,300,000
<u>Joint Investments</u>	
Collaborative project to be determined by HECC workgroup	\$2,313,345

Tranche 2 Campus Project Proposals

Enrollment Projects

Oregon Institute of Technology: Strategic Enrollment Management Plan

Oregon Tech has not fully developed a long term, data-driven strategic enrollment plan. Strategic enrollment plans incorporate critical cross institution collaboration to maximize recruitment, retention, and marketing strategies leading to long-term, sustainable, and predictable enrollment. Developing a comprehensive five-year plan will better align institutional resources and priorities toward sustainable student enrollment. Working with leading higher education consultants, Oregon Tech would create its five-year enrollment plan by:

1. Clearly aligning recruitment strategies, data-driven decision making, and investing in retention strategies and institutional marketing commitments.
2. Engaging institutional constituents to develop a collaborative plan with all audiences in mind, creating a shared vision and direction.
3. Create an actionable plan to better align institutional resources toward recruitment and retention of students.

This project is intended to increase enrollment by identifying market and institutional barriers to enrollment, identifying new market opportunities such as new programs or course delivery options, and aligning the institution towards a shared vision of enrollment strategy over the next five years. This plan will lay out the strategic direction and give departments a framework and direction for comprehensive enrollment increase.

Project Spending Plan & Timeline

Oregon Tech seeks to use \$200,000 of its Tranche 2 funding to hire a consulting firm to manage the strategic enrollment planning process. Developing the plan will take approximately 18 months from the time of consultancy hire. Once developed, the plan will guide university enrollment efforts for five years.

Impacts on Operating Budget

This project will result in revenue generation, as it will result in Oregon Tech having a strategic, institution-wide plan to enroll more students. It will also help the university determine future demographic changes and other changes in college-going rates. Oregon Tech anticipates that it will only need to enroll approximately 16 more students to break even on this project.

Measuring Success

Success for this project will first be measured by the timely development of a strategic enrollment plan that Oregon Tech can operationalize.

Campus Engagement

This project has been discussed with department directors across the university, including faculty on both campuses. The need for shared strategic vision for enrollment has been a topic of conversation at many Oregon Tech meetings throughout the last few years.

Southern Oregon University: Student Centered Design and Accessibility – Outreach/Marketing/Branding/Website

In the fall of 2023, SOU experienced a 15.9% increase in first year enrollment, and a 10% increase in transfer students. These remarkable figures were the result of highly strategic outreach and engagement. Even with those enrollment increases, SOU recognizes that to continue that success year after year, it must identify areas for improvement in its public facing outreach, including improving how prospective students and their families interact with the SOU website. Their ability or inability to navigate the site effectively creates their first impression of SOU.

Prospective and current students report that SOU's website is not a user-friendly, useful tool, and important areas of the website struggle with ADA compliance and create language barriers for the university's Latinx population. Many of these problems are rooted in the rapidly changing nature of technology and the lack of resources necessary to keep up with these technological changes.

Utilizing Tranche 2 financial sustainability funds to partner with a professional firm to update and modernize the university's marketing and branding strategy, website, and strategic enrollment plan into a cohesive student-focused effort will improve students' access to the information they need to be successful in enrolling and accessing services at SOU. In addition to serving current SOU students, this work is critical to supporting students from other universities in accessing classes at SOU to assist with progress toward a degree at their home institutions. It is critical that SOU makes it easier for students unfamiliar with the campus to navigate easily through enrollment and support services at SOU. This project directly supports Student Mobility & Success.

This project is a four-step process to reset SOU's website presence:

- 1) Defining and creating a culture that places student success at the center of SOU's digital communication.
- 2) Careful planning to place enrollment and completion at the center of SOU's web presence.
- 3) Creation of a core website identity, a portfolio of template designs and tools to improve the user experience; and that enforce compliance with accessibility standards.

4) Execution of this plan.

By contracting with a firm to evaluate and integrate SOU's multi-pronged effort to increase student recruitment and retention and then to develop an implementation plan, the university will be able to strategically refocus its effort to significantly better serve students.

Project Spending Plan & Timeline

January 2024: "Campus Conversation" (all-campus meeting) focused on marketing and the university's website. The Conversation will share the vision and goals for this work and gather campus input as to how to optimize SOU's outward facing platforms and outreach.

February 2024: Release a Request for Proposal for development of the strategic marketing plan which will be the foundation for the website revisions. The RFP will define parameters for a plan that centers student success, fostering ease of enrollment and access to support services.

April 2024: Sign a contract for strategic marketing plan services.

June 2024: Review and approve strategic marketing plan.

July 2024: Issue an RFP for website development services.

August 2024: Sign contract for website development services.

September - December 2024: Work with website development firm and campus departments on revised content.

January 2025: Roll out of the new website.

Project cost:

Strategic Marketing Planning & Implementation Services - Approximately \$500,000.

Impacts on Operating Budget

SOU is at a critical juncture in enrollment management. A three-year intensive focus on enrollment management has yielded powerful results, with a 15.9% increase in new first year students and a 10% increase in transfer students in fall 2023. Yet budget cuts necessary to align revenues and expenses led SOU to eliminate the position of Vice President of Enrollment Management. SOU must find a way to hold on to and continue this enrollment success without this leadership position. A one-time investment seeding a strategic marketing plan that connects the dots on SOU's enrollment efforts and provides clear communication for students as they navigate the institution will allow the university to successfully eliminate ongoing personnel expenses without losing ground gained on enrollment management.

SOU's website should be a significantly valuable asset, but it suffers from deferred maintenance – similar to more traditional brick-and-mortar campus infrastructure. SOU anticipates that these website updates and modernizations will help improve enrollment and retention due to more accessible and supportive information becoming readily available to students. In addition, having a formal plan for website structure, design, and conformance to web accessibility standards will increase efficiency by introducing order to website maintenance while also reducing non-compliance risk.

Measuring Success

First, in measuring the success of this project, SOU will look to replicate the remarkable gains it made in both first year and transfer students throughout the next several years. In terms of website-specific measurements, SOU will utilize several measures to determine success. SOU anticipates improving in the following objective standards: keyword rankings, organic traffic, time spent on page, click-through rate, bounce rate, returning visitors, and domain authority ranking. Additionally, it hopes to improve its website ranking as an essential place where prospective students discover SOU. It is equally critical to understand how (and if) SOU's marketing efforts, specifically the website, are contributing to enrollment gains. SOU also aims to record increases in satisfaction on its internal student surveys regarding its web-based services. Finally, SOU expects to meet ADA standards for all pages and put in place procedures and training to maintain compliance.

Campus Engagement

Feedback from SOU's entire campus community as part of the TRU+ Sustainability Funding process prioritized the pressing need to revamp the university's website. The project was prioritized based on input from students, faculty, and staff following SOU's Campus Conversation (all-campus meeting) in November 2023.

Portland State University: Building More Effective Pathways into PSU

This project proposal includes efforts to direct additional enrollment to Portland State University through more robust recruitment into the university's Senior Inquiry partnerships with high schools. Students will begin their time at PSU with 15 advanced credits. The project will also expand marketing for high demand graduate programs as well as marketing PSU to Native American Tribes across the U.S., who are charged resident tuition regardless of where they are located.

Through this project, PSU hopes to accomplish higher enrollment of first year undergraduate students, graduate students, and members of Native American tribes across the country. This translates into increased tuition revenue and, in the longer run, increased state funding as students persist and graduate. This enrollment increase will be due to a more robust pipeline of high school seniors that otherwise might not envision themselves at college at all. Native American students will build a community of Native students from across the nation.

Project Spending Plan & Timeline

1 fixed-term faculty (2 years)	\$703,800
Senior Inquiry EM Coordinator (2 years)	\$120,000
Marketing	\$50,000
16 college readiness community events at high schools (one each year for 8 schools)	\$40,000
4 PSU visits from Parkrose and Alliance	\$10,000
Funding for substitute teachers at high schools (4 PSU visits, 4 professional development workshops)	\$5,000
Bus rentals for 2 trips to PSU per school	\$5,000
Marketing campaign for high demand graduate programs	\$145,000
Temporary staff coordinator for outreach to Tribes	\$100,000 over 2 years
Travel	\$12,000
Collateral development for Tribal residency tuition program marketing	\$6,0000
Total	\$703,800

Projects can begin as soon as the funding is released and can be completed in two years.

Impacts on Operating Budget

Once established, the Senior Inquiry program will be lower cost to maintain over time; furthermore, these students persist and graduate at higher rates than students who did not participate in senior inquiry. Higher enrollment in graduate programs will build credibility and momentum that will be easier to maintain once the programs are better attended. In addition, survey results show that the planned marketing campaign is effective in converting interested graduate students into attendees. Marketing to Native American Tribes will establish PSU as a preferred destination for students from tribes across the country.

The establishment of these projects will use only one-time funds and, once established, will have momentum and will not require additional investment.

Measuring Success

Success for this program will be measured through:

1. The number of new undergraduates who enroll and persist from the new Senior Inquiry programs.
2. The change in the number of graduate students in programs specifically marketed through the ad campaign.

3. The change in the number of Native American students taking advantage of the resident tuition program.

Campus Engagement

PSU engaged in a thorough campus engagement process for selecting Tranche 2 sustainability funding proposals, as detailed above on page 8 of this report.

Portland State University: Renovation of a new University Welcome Center

A campus visit has been shown to be one of the most important factors in where a student decides to attend college. The number of students and organizations wanting to come to PSU for campus visits has been increasing steadily over the last few years. Because of this, PSU's Enrollment Management department needs to double its capacity for on-campus visits. Through this project, PSU plans to renovate an existing space to create a 50-75 person presentation space/welcome center.

Project Spending Plan & Timeline

The total budget for this proposed project is \$500,000. All resources will go toward the renovation cost, furniture, and recruitment display. PSU will begin the project once funding is released and anticipates that it will take 4-6 months to complete.

Impacts on Operating Budget

This one-time investment in a new University Welcome Center will generate new revenue for the university through increased enrollment. Through this project, PSU is seeking to double the number of students who visit campus and anticipates that the number of visitors who apply and later enroll at PSU will increase significantly.

Measuring Success

Success for this project will be measured by a change in the percentage of campus visitors who enroll at PSU.

Campus Engagement

PSU engaged in a thorough campus engagement process for selecting Tranche 2 sustainability funding proposals, as detailed above on page 8 of this report.

Portland State University: On-Campus Housing Feasibility Study

Creating affordable student housing options that can be sustainably funded is difficult in today's market. Through this project, PSU seeks to update the university's Housing Master Plan with current enrollment and market data.

Student housing is an important part of the decision first year students and their parents make when choosing which school to attend. On-campus housing opportunities are one of the many tools used to support student retention, engagement, and overall success. More affordable student housing will increase enrollment and thereby generate revenue. One of the barriers to students attending PSU remains the lack of affordable housing in the city.

Ensuring an appropriate range of housing that is affordable for first year students and beyond will help improve enrollment and retention. This project will result in clear direction for University Housing and Residence Life (UHRL) that is aligned with the university's Strategic Plan and the results of its Low-Income Student Housing Study as well as an action plan for future renovations and potentially new housing buildings. In addition, the PSU-ARCS pilot will provide the university with a proof of concept on the efficacy of standing up an ARCS model in on-campus housing through PSU's UHRL program. In the long run, more affordable housing will increase enrollment and therefore generate revenue.

This project uses one-time funds with the primary goal of creating a more financially sustainable housing portfolio. This will ensure that PSU's housing revenue covers costs while serving student wants and needs for housing close to campus that contributes to their success.

Project Spending Plan & Timeline

The total budget for this proposed project is \$450,000. Funds will be used to hire a consultant to review the current and future demand for student housing on the PSU campus (and other campuses if expanded to the TRUs) and determine the best mix of housing to create a financially sustainable housing portfolio. PSU is also requesting funds for a direct subsidy to students to offset on-campus housing costs (PSU-ARCS pilot program).

Updating PSU's Master Plan will require an RFP process which typically takes 3-6 months. The actual study would take 9 months to complete. The PSU-ARCS pilot can begin as early as fall 2024 with a one-year duration, after which time PSU will assess the outcomes and opportunities to partner with the PSU Foundation on philanthropic and other governmental support.

Impacts on Operating Budget

UHRL is PSU's largest auxiliary, and its ongoing sustainability is vital to the financial health of the university. This long-term endeavor will increase revenue and reduce operating costs. Combined with outcomes from the Housing Affordability Study, PSU will develop an understanding of challenges and opportunities and identify the right mix of affordable housing

approaches necessary for long-term success. Ultimately, more affordable student housing is expected to increase enrollment and generate revenue.

Measuring Success

Success for this project will be measured through the completion of a study that provides direction for PSU's University Housing and Residence Life (UHRL).

Campus Engagement

PSU engaged in a thorough campus engagement process for selecting Tranche 2 sustainability funding proposals, as detailed above on page 8 of this report.

Western Oregon University: Operation Wolfstorm

Western Oregon University anticipates prioritizing a portion of its Tranche 2 funding for the university's ongoing Operation Wolfstorm initiative. Operation Wolfstorm is a collaborative initiative between Western Oregon University (WOU) and Chemeketa Community College aimed at enhancing academic and administrative services. The project's ultimate goal is to provide students with efficient pathways to graduation and potentially enable them to earn multiple credentials within a standard four-year degree timeline.

For more information on WOU's Operation Wolfstorm initiative, please see page 17 under *Tranche 1 Projects*.

Campus Engagement

WOU plans to launch a survey in early 2024 to seek campus input on Tranche 2 priority projects. While Operation Wolfstorm is anticipated to be one of WOU's priority projects, it is likely that other projects not included in this report will also rise to become Tranche 2 priority projects based on campus input. WOU will finalize all Tranche 2 projects before the 2024 HECC report to the legislature on the financial sustainability funds is finalized.

Student Success & Retention Projects

Oregon Institute of Technology: Courserdog Analytics

Oregon Tech used a portion of its Tranche 1 financial sustainability funds to support the implementation and first year license cost for the Courserdog Analytics tool. This tool allows the university to support student success with actionable scheduling and curriculum analytics that improve course access and operational efficiency, while accelerating degree completion. The Courserdog Analytics tools will also support Oregon Tech's ability to easily design degree plans and develop pathways to improve program completion through analytics.

Oregon Tech proposes utilizing the Tranche 2 funds to support the total cost as a one-time payment for years two through five of the Courshedog Analytics tool license fees.

Project Spending Plan & Timeline

The total cost for this investment will not exceed \$150,000. The annual cost of the license fees is approximately \$37,700 per year on average for four years.

The contract will be created and reviewed through university processes and the \$181,000 recorded as provided from Tranche 2 funds before the announced spending deadline.

Impacts on Operating Budget

The Courshedog Analytics tool will help the university retain students with improvements to course scheduling and time to graduation. Portions of this initiative will also, over time, replace some existing software licenses, resulting in eventual cost savings within the Office of the Registrar.

By optimizing the course scheduling process utilizing real time data analytics, student throughput toward degree completion will also eventually generate revenue for Oregon Tech through improved retention of students and more efficiencies in scheduling larger cohorts of students. Better student retention statistics and shorter time to degree completion should also help the university recruit more students.

Measuring Success

The addition of the Courshedog Analytics tool modules will allow the university and individual academic departments to alleviate course scheduling issues, bottlenecks and conflicts with improvements made to curriculum maps, which will allow students to complete a degree in a more timely manner. If funds are committed as requested, then the operating budget of the Office of the Registrar will not require any adjustment for the five years of the Courshedog contract term. After this initial five-year period, the Registrar will evaluate the efficacy of the Courshedog tools and its impact on access and scheduling efficiencies and determine if an additional contract term would be beneficial.

Campus Engagement

This project has been vetted by the Oregon Tech's Retention subcommittee and shared with the Oregon Tech sustainability team. This initiative was also shared with the university community, including students, staff, and faculty during a public forum and in a campus wide email. This project was informed by feedback from a Qualtrics survey and feedback during office hours with institutional leaders.

Oregon Institute of Technology: Online Campus Retention and Student Success Coaching

The proposal seeks to support Inside Track coaching of all online campus undergraduate students in a fully online program. This program expands and rolls-out the Inside Track small proof-of-concept pilot supported with Tranche 1 funds to include all online campus students at the undergraduate level who elect to opt-in to the coaching service. This represents a significant expansion of the small proof-of-concept pilot program. This program will support retention across all online campus undergraduate students during the 2024-25 and the 2025-26 academic years. By making coaching available to all online campus students, Oregon Tech will enable strong and consistent improvement in student retention and graduation rates.

Project Spending Plan & Timeline

The online campus coaching program cost will not exceed \$240,000. The \$240,000 total cost will support coaching of all freshmen, transfer students, and new starts for one full year during both the 2024-25 and the 2025-26 academic years. Coaching will be available to all undergraduate students whether they are in a fully online degree program or simply taking courses online as non-degree seeking students. The full program and contract with Inside Track can be implemented and paid prior to the deadline for spending of the Tranche 2 funds. The project implementation would align to the coaching project commencing in time for fall 2024.

Impacts on Operating Budget

This is a retention focused initiative. This project is a cost saving project because it is always more cost effective to retain an admitted student rather than to recruit and start a new student. The re-enrollment coaching will also bring students back to campus to complete their degree program and, as with retaining current students, it is always more cost effective to support re-enrollment and completion rather than to find and admit new students.

Measuring Success

Success for this project will be measured against increases in term-to-term retention of students and increased levels of student success and eventually increased graduation rates. Oregon Tech will also track students who re-enroll after a hiatus.

Campus Engagement

This project has been vetted by Oregon Tech's Retention subcommittee and shared with the Oregon Tech sustainability team.

Oregon Institute of Technology: Ally Accessibility Software

Oregon Tech seeks to utilize \$25,000 of its Tranche 2 funding for a pre-paid, five-year license for Ally Accessibility software.

Ally is a product that integrates with the Canvas LMS ecosystem to scan for and review material for accessibility. Currently, it is up to each Oregon Tech faculty member to evaluate their own material, and the university frequently hears that this expectation is overwhelming in terms of time, cognitive load, and necessary technical expertise. Ally automatically evaluates Canvas content and then provides step-by-step instructions for improving accessibility, making it easy for instructors to make small changes with big impacts.

Accessible resources benefit all students, not just the nearly 20% of students with disabilities (US National Center for Education Statistics). For example, a student athlete could listen to course material while in the gym or traveling, a student parent could listen to material while driving their children to out-of-town activities, and a student who cannot afford new technology at home could listen to the material instead of trying to read it on their smart phone. Accessibility means more engagement with the material and therefore more opportunities for learning.

Implementing an accessibility tool at Oregon Tech would positively impact student learning and retention by making learning more portable, supporting more learning styles, freeing up instructor time to focus on quality content (rather than format), and explicitly fostering and making visible a culture that prioritizes student needs and experiences.

Project Spending Plan & Timeline

The Ally pre-paid 5-year license cost will not exceed \$25,000. The software can be implemented and paid within 30 days and the project implementation would correspond to the spring or summer term start.

Impacts on Operating Budget

This is a retention-focused project and will focus on students admitted to the university. The program will increase enrollment by improving retention and self-reported measures of student success and satisfaction with course work and course-based learning.

Measuring Success

Success for this project will be measured against increases in term-to-term retention rates and graduation rates.

Campus Engagement

This project has been vetted by Oregon Tech's Retention subcommittee and shared with the Oregon Tech sustainability team.

Oregon Institute of Technology: Re-Enrollment Coaching and Strategic Communication to Stop Outs

Oregon Tech's Inside Track Re-Enrollment Coaching Program will strategically communicate with and provide coaching to stopped out students from the Portland Metro, Klamath Falls and online campus who have left the university. The program will support and encourage them to ready themselves for re-enrollment and successful completion of their degree program. The program will run using either one or two distinct vendors, Motimatic and/or Inside Track.

Once the student has been supported through the re-enrollment and registration process, then the student will receive retention and student success coaching for up to three terms after the re-enrollment to ensure that the student does not stop out again and so the university is able to provide as much support as possible through graduation.

Project Spending Plan & Timeline

The re-enrollment coaching program cost will not exceed \$180,000 or \$90,000 in each of the two academic years. During the 2024-25 academic year, up to \$45,000 will be allocated to support re-enrollment coaching and up to \$45,000 will be allocated to the student success and retention coaching element of the program that supports the student once they have re-enrolled and registered for courses. This student retention and success coaching will then extend for up to three terms for each re-enrolled student. Again, during the 2024-25 academic year up to \$45,000 will be allocated to support re-enrollment coaching and up to \$45,000 will be allocated to the student success and retention coaching element of the program that supports the student once they have re-enrolled and registered for courses. This student retention and success coaching will then extend for up to three terms for each re-enrolled student. The full two-year coaching program and contract with Inside Track can be implemented and paid for prior to the deadline for spending of Tranche 2 funds.

Impacts on Operating Budget

This is a retention focused initiative. This project is a cost saving project because it is always more cost effective to retain an admitted student rather than to recruit and start a new student. If the program is effective, continuing the program will offset the continuing costs and enable the institution to generate more revenue, by improving student retention and overall enrollment.

Measuring Success

Success for this project will be measured against increases in graduation rates. Oregon Tech will also track the number of students who re-enroll after a hiatus and who remain enrolled through to graduation.

Campus Engagement

This project has been vetted by Oregon Tech’s Retention subcommittee and shared with the Oregon Tech sustainability team.

Oregon Institute of Technology: First Year Experience Course

Oregon Tech seeks to use a portion of its Tranche 2 financial sustainability funds to design a university-wide, one credit, first year seminar that engages students with university faculty and administrative offices, as well as the full array of student-facing services across the university.

The course will offer a reduced tuition rate to encourage first year students to enroll. For fall 2024, all first-year students will be enrolled in this course, taught by faculty and staff to offer increased support to help with the transition to becoming an Oregon Tech student. The course will increase student understanding in the following topics: time management; navigating Oregon Tech systems such as Canvas, Web for Student, Outlook, and Degree Works; financial literacy and how to apply for scholarships/grants; how to seek on-campus employment in support of student academic pursuits; how to connect with tutoring, the Oregon Tech Math Lab, and other academic support resources; and how to connect with academic and supplemental advisors each term, and why successful students do this.

The program will connect with major and non-major faculty for the first-year student and foster these relationships throughout the collegiate experience and beyond. The course will also support learning about the local community through field trips, and a culminating community service project.

Project Spending Plan & Timeline

The cost for this project is not to exceed \$20,000 and the timeline for course design and delivery is 90 days. Costs include supplies to teach the class, including materials related to the coursework.

Impacts on Operating Budget

This is a retention focused initiative. This project is a cost-saving project because it is always more cost effective to retain an admitted student rather than to recruit and start a new student.

Measuring Success

Success for this project will be measured against increases in term-to-term retention of students and increased levels of student success and eventually increased graduation rates.

Campus Engagement

This project has been vetted by Oregon Tech’s Retention subcommittee and shared with the Oregon Tech sustainability team. This initiative was also shared with the university community, including students, staff, and faculty during a public forum and in a campus wide email. This project was informed by feedback from a Qualtrics survey and feedback during office hours with institutional leaders.

Oregon Institute of Technology: Inside Track Coaching Proof-of-Concept/Pilot Program for Career Coaching as an Embedded Part of the Admissions Process

Oregon Tech’s Coaching Proof-of-Concept/Pilot Program for Career Coaching as an Embedded Part of the Admissions Process seeks to support applicants with career focused coaching and support so that students make more informed choices about career and degree program alignment. This will help with retention to graduation by supporting informed decision making about career choices and ensuring that students have the optimal degree program and course selections to support early career success with the desired professional area or field of study. This type of coaching support within the application process and timeline is especially helpful to first generation students and students from families or backgrounds without exposure to the field of study that the student is wanting to pursue. A range of data and studies suggest that this type of coaching is beneficial to retention and self-reported measures of student success.

Project Spending Plan & Timeline

The cost of the Career Coaching Program as an Embedded Element of the Admission progress will not exceed \$100,000. The full program and contract with Inside Track can be implemented and paid within 30 days and the project implementation would correspond to the next upcoming term start.

Impacts on Operating Budget

This is a revenue generating measure designed to encourage and support more students selecting Oregon Tech as their first-choice institution.

Measuring Success

Success for this project will be measured against enrollment goals and number of committed first-year students and transfer students paying deposits or enrolling.

Campus Engagement

This project has been vetted by Oregon Tech’s Retention subcommittee and shared with the Oregon Tech sustainability team.

Oregon Institute of Technology: Expanded Digital Communication to Dual Credit, Transfer, Returning and Re-Enrolling Students Through Motimatic

Oregon Tech seeks to integrate its newly redesigned and rebranded dual credit, transfer, and retention marketing materials and engage students where there are – online. Motimatic improves university recruitment and enrollment by engaging students throughout the enrollment pipeline using techniques rooted in behavioral science. According to Motimatic, as students browse their favorite websites and social platforms, they see higher education digital marketing posts that motivate key behaviors. Oregon Tech plans to target specific students based on campus location and enrollment status, with focused communication to its transfer students in the Portland Metro area to drive enrollment, returning students to drive registration and retention, and stop-out students to drive re-enrollment.

Project Spending Plan & Timeline

Oregon Tech has proposed a \$150,000 investment in this project. These funds would be spent over a one-year period and communications would be delivered over the course of that year.

Impacts on Operating Budget

This project is intended to increase enrollment among including new students, transfer students, returning students, and stopped-out students. It will increase enrollment by expanding communication with students and leveraging behavioral science techniques to drive them to act. Oregon Tech piloted this program twice last year with much success.

Measuring Success

Success for this project will be measured by the number of students who interact with Oregon Tech's communications and then enroll.

Campus Engagement

Oregon Tech piloted this project twice last year, once for returning students and once for new students, with great success. During these pilots, the university shared the project with various staff departments that would be directly affected, including Advising & Retention, the Registrar's Office, and Marketing.

Eastern Oregon University: Equity, Retention and Completion

Eastern Oregon University will use its full allocation of the Tranche 2 financial sustainability funds for its Moon Shot for Equity initiative. The five-year initiative between EOU, Blue Mountain Community College (BMCC), and Treasure Valley Community College (TVCC) seeks to establish an integrated regional education ecosystem and comprehensive equity strategy to increase student retention and completion and close the equity gap.

The Moon Shot for Equity program began in 2021 and is a proven concept that has enabled the three involved institutions to retain more students and generate revenue through the retention of current and future students. The program is expected to continue through 2026.

For more information on EOU's Equity, Retention and Completion initiative, please see page 19 under *Tranche 1 Projects*.

Western Oregon University: Destination Western

Western Oregon University anticipates prioritizing a portion of its Tranche 2 funding for the university's ongoing Destination Western initiative. Destination Western is a bridge program aimed at helping incoming students transition smoothly into university life. It includes a two-week summer immersion program where new students stay on campus, engage in peer-to-peer counseling, and learn from upperclassmen about adapting to the university environment. Participants receive a stipend to offset potential lost wages during this period.

For more information on WOU's Destination Western initiative, please see page 23 under *Tranche 1 Projects*.

Campus Engagement

WOU plans to launch a survey in early 2024 to seek campus input on Tranche 2 priority projects. While Destination Western is anticipated to be one of WOU's priority projects, it is likely that other projects not included in this report will also rise to become Tranche 2 priority projects based on campus input. WOU will finalize all Tranche 2 projects before the 2024 HECC report to the legislature on the financial sustainability funds is finalized.

Portland State University: Revitalized Summer Session

This project will form a workgroup at PSU that will explore a multi-faceted approach to the university's summer session, involving exploration/analysis of funding models and offerings for students (internal and external), expansion of programs to middle/high school students, collaboration with TRUs to offer summer exchange programs, and leveraging PSU's location to offer summer residential programs. The project enhances revenue streams, leverages summer as a recruitment tool, and facilitates degree completion (ex: final trailer courses, early degree starts, summer in the academic term, etc.). A stronger summer session will also lead to a more vibrant campus during the summer.

A strong summer session will increase both credit and non-credit enrollment and will also help generate auxiliary revenue through housing. The redesign of summer session will be executed with one-time funds to cover start-up costs. Going forward, summer session revenue will make the program self-sustaining.

With additional planning/coordination, PSU will be able to support student progression for current PSU students, as well as support students from TRUs and other universities. Additionally, the university would be able to support a focused and more enriched student experience and offer opportunities for non-credit experiences that would help high school students see themselves in higher education.

Project Spending Plan & Timeline

The total proposed budget for this project is \$550,000. The project will use temporary project managers to organize the work group and manage the project. Some funding will be used for consultants to vet revenue models and conduct market research of specific offerings. Funding will also be used to develop marketing materials for specific programs and push those materials into student markets. Finally, temporary instructors will be hired to run experimental summer sessions and academic professionals will design and implement an evaluation plan for the new sessions. New programs will be planned during 2024 and executed in summer of 2025.

Impacts on Operating Budget

A stronger summer session at PSU will 1) generate additional tuition revenue during the summer; 2) generate non-credit revenue through non-credit workshops and camps; 3) generate housing revenue; and 4) build student pipelines for future students.

Measuring Success

Success for this project will be measured through an increase in summer session enrollment and revenue and through students stating that they enrolled at PSU as a result of a summer session experience.

Campus Engagement

PSU engaged in a thorough campus engagement process for selecting Tranche 2 sustainability funding proposals, as detailed above on page 8 of this report.

Portland State University: Supporting Current and Prospective Native American Students and Men of Color

This project will build structure and supports for Native American and Alaska Native students in STEAM, health, and early childhood education and further the sustainability of supports for men of color at PSU.

A collaborative of Native individuals and non-Native allies will create new institutional supports for PSU's Native American and Alaska Native students. Through this project, the university will invest in activities that will help PSU to become the destination university for Native STEAM and

health students from Oregon and the Pacific Northwest, complementing PSU's enrollment outreach to nationally recognized tribes.

This project also responds to the need to support Native early childhood educators by creating the infrastructure needed as enrollment increases in response to PSU's strength-based model of course offerings/programming developed by Native faculty with Tribal Nations and communities. Finally, this project provides similar support for men of color who have lower retention and graduate rates.

Project Spending Plan & Timeline

The total budget for this proposed project is \$335,000. Funding for this project will be used for the following:

- Temporary staff time for Tribal relations training to STEAM faculty and staff and for coordinating with multiple departments and faculties
- Student mentoring and workshops
- Honoraria for Native STEM professionals in residence
- Hosting for Native Summit community event
- Printed materials
- Tuition or housing remissions for tribal STEAM/health majors
- Printed materials/supplies for recruitment events
- Grant writing for longer term support

This project will start as soon as the funding is released and will be completed within two years.

Impacts on Operating Budget

This project will generate revenue for PSU through retaining students who are at risk of stopping out (Native students and men of color). At PSU, for every 100 students retained fall to fall, the net tuition impact is over \$700,000. Retention of students is not only best for the students who graduate and begin careers, but also provides additional revenue for PSU. If 100 retained students continue to persist through graduation, the impact is \$1.2 million in revenue. Therefore, retaining students is a high impact strategy and PSU has dedicated a large portion of its Tranche 2 financial sustainability funding to different aspects of retention.

Measuring Success

Success for this project will be measured through an increase in student retention and graduation of Native students and students of color.

Campus Engagement

PSU engaged in a thorough campus engagement process for selecting Tranche 2 sustainability funding proposals, as detailed above on page 8 of this report.

Portland State University: Global Diversity, Equity, and Inclusion

Through this proposed project, PSU’s Disability Resource Center (DRC) and Learning Center will work together to improve the experience of students with disabilities as well as the efficiency with which those services are provided. PSU seeks to shift the timeline for accommodation requests to orientation so that the university can address the needs of these students sooner. PSU will also enhance accommodated testing services to meet the institution’s obligation that are scalable to meet the increasing population of students approved for testing accommodations. The Testing Services/Learning Center will also partner with PSU’s DRC & other campus partners to review best practices for accommodated testing center models and universal design for assessment.

Project Spending Plan & Timeline

Project manager	\$50,000
Promotional materials	\$10,000
Consultant	\$40,000
Ergonomic furniture purchasing	\$50,000
Furniture	\$20,000
Faculty release time for pedagogical experts to research best practices for student assessment	\$40,000
Test proctor coverage to allow current leadership sufficient time to engage in development of proposal and training tools development	\$30,000
Total	\$240,000

This project will begin as soon as the funding is released.

PSU plans to purchase the furniture necessary to accommodate students in the testing center and begin designing the new approach immediately, testing the new approach in the following term, and adjusting it for implementation in the term following.

Impacts on Operating Budget

This project uses one-time funding to address pressing student needs and improve efficiency. In the absence of these services, students may fail and/or stop out, failing the students and reducing revenue for the institution.

This is a project that can increase revenue through retention. Over time, the additional efficiency with which PSU meets these accommodations will serve more students, increasing retention.

Measuring Success

Success for this project will be measured through improved efficiencies and addressing student needs at PSU's Disability Resource Center and Learning Center, resulting in increased retention of students served by these programs.

Campus Engagement

PSU engaged in a thorough campus engagement process for selecting Tranche 2 sustainability funding proposals, as detailed above on page 8 of this report.

Portland State University: Revitalizing General Education to Improve Student Retention

Through this project, PSU seeks to convene a campus planning process around changes to the sophomore and junior year of University Studies curriculum, which is in need of revitalization due to changes in PSU's student body (majority BIPOC), declining enrollments in many units, and piecemeal modifications approved by the university's Faculty Senate. This is a student-centered project. Curricular revitalization is a site of opportunity for curricular innovation, interdisciplinary collaboration, and initiatives to promote transfer student success.

Project Spending Plan & Timeline

The total budget for this proposed project is \$135,000. Funds will be used for:

- A facilitator to design and lead university-level conversations
- Hosting a workshop for student, faculty, and staff engagement
- Faculty time to survey students and faculty to gather and analyze data about existing curriculum and the values and goals to guide changes
- Stipends for faculty who lead the curriculum redesign work

Planning can begin immediately to design the survey(s) for winter implementation and to lay the groundwork for a campus wide symposium in the late winter/early spring. Analysis of cluster enrollments is already underway and ongoing. Alternative models will be developed over the summer to present to PSU's Faculty Senate in fall 2025.

Impacts on Operating Budget

This project will utilize one-time funds that will not generate an ongoing financial obligation. Rather, revitalizing the curriculum with an eye toward the needs of BIPOC students will improve retention at PSU. Higher retention rates are expected to generate additional revenue.

Measuring Success

Success for this project will be measured through the retention rates of students from year 2 to year 3 and from year 3 to year 4.

Campus Engagement

PSU engaged in a thorough campus engagement process for selecting Tranche 2 sustainability funding proposals, as detailed above on page 8 of this report.

Portland State University: Partnering to Enhance Undergraduate Research Experiences

This project will promote the financial sustainability of PSU programs supporting historically marginalized students in meaningful undergraduate research experiences by reducing isolation, avoiding redundancy, expanding capacity, and improving program delivery through core administrative and programmatic functions that reduce marginal costs for programs.

PSU's goals through this project are to improve student retention, promote professional development, foster career placement, and diversify and Indigenize Oregon's STEM workforce.

PSU's Center for Internship, Mentoring & Research (CIMR) uses a consolidated service-center model to operationally and programmatically support multiple externally funded STEM research training/internship projects for historically excluded students and support holistic student career development. This approach will be extended to coordinate with similar efforts across the TRU institutions.

Project Spending Plan & Timeline

The total budget for this proposed project is \$300,000. Resources needed for this project include dedicated time from CIMR faculty and staff, funding for the time and effort of colleagues at partner institutions, and support for travel and expenses. PSU will also contract with a consultant with expertise in cross-institutional partnerships.

Impacts on Operating Budget

The project uses one-time funds to build partnerships with other institutions. They will employ a collective impact approach with colleagues responsible for undergraduate research at PSU and the TRUs to jointly review best practices, develop systems, share resources, and consolidate efforts to reduce and share fixed costs so more students can be served with minimal marginal costs.

This is a project that can have broad impacts on student success throughout the state. Engaging in culturally responsive mentored research/internship experiences improves retention,

academic success, and career preparation, particularly for historically underrepresented students. Participating PSU students reported greater sense of belonging, had year-to-year retention rates of 89-91% from 2020-2022, and were more likely to graduate in four years than their peers.

By improving retention, the long-term revenue generation for PSU and the TRUs will return the initial one-time investment.

Measuring Success

Success for this project will be measured through 1) agreements reached with the TRUs; 2) BIPOC students served with undergraduate research/internship experiences; 3) retention rates for participating students compared to non-participating students; and 4) career placement rates.

Campus Engagement

PSU engaged in a thorough campus engagement process for selecting Tranche 2 sustainability funding proposals, as detailed above on page 8 of this report.

Portland State University: Vibrant Campus: Student Success Hub to Improve Wayfinding and Access

In 2021, PSU partnered with a consultant to assess PSU's campus identity and its impact on student success, determining that it is crucial in creating a welcoming environment. PSU sees a significant opportunity to utilize Tranche 2 sustainability funds to better define its campus and improve student wayfinding.

The Student Success Hub in PSU's Fairborz Maseeh Hall will enhance collaboration, strengthen connections to academic resources, and promote student persistence and belonging. It will serve as a physical space for resources and cross-divisional networking. The hub aligns with PSU's key priorities by:

- Fostering unity in purpose through collaboration
- Enhancing campus vibrancy through physical space, programming, events, and branding
- Integrating with PSU's student success strategy to create student-centered experiences
- Complementing the VFS emphasis on physical space
- Promoting belonging and academic mindset
- Improving student persistence

Project Spending Plan & Timeline

The total budget for this proposed project is \$750,000. PSU plans to use existing staff for project management, coordination, and leadership for this project. The Tranche 2 sustainability

funding will support project marketing and branding. PSU plans to create branding and signage to improve student wayfinding. Capital Projects provided input on repurposing part of a building and the financial sustainability funding will be used to make the proposed building changes. PSU also plans to involve its Facilities department for outdoor lighting options.

Impacts on Operating Budget

This project uses one-time funds to help students thrive in the classroom (learning center), receive holistic academic support (advising/student success), and progress toward graduation with a clear sense of their future (career). A hub will create an entry point for students to the many academic supports. Further, the hub will serve as a literal bridge to student resources and as a connector to other campus resources. This project is expected to generate revenue by improving retention and student success.

Measuring Success

Success for this project will be measured through an increase in PSU's student retention rates.

Campus Engagement

PSU engaged in a thorough campus engagement process for selecting Tranche 2 sustainability funding proposals, as detailed above on page 8 of this report.

Portland State University: Helen Gordan Child Development Center: Preschool for All Self-Study

The Helen Gordon Child Development Center is a lab school at PSU. Currently, it does not qualify for Preschool for All funding from Multnomah County due to the low wage rates paid to its staff under the SEIU contract. Tranche 2 financial sustainability funding will allow PSU to develop a self-study for the Helen Gordon Child Development Center (HGCDC) application to Multnomah County's Preschool for All (PFA) Program. Preschool For All provides annual revenue to providers of \$18,000 to \$21,000 per child, and PSU has capacity for 137-161 children.

This project will improve the availability of childcare for students as well as faculty and staff and reduce childcare costs for students. This will also offer students more predictable hours for childcare with more hours and slots available for faculty, staff, and students. This program would also provide free preschool to low-income students with more flexible hours, up to 10 hours per day of childcare.

Project Spending Plan & Timeline

The total budget for this proposed project is \$484,000. The resources for this project will be used to hire a consultant with expertise in Preschool for All (PFA) to complete a self-study

proposal for HGCDC to apply for the next round of PFA applications with Multnomah County (summer 2024). The consultant will work with the Director of HGCDC, the COE Dean, and stakeholders (HGCDC staff, COE faculty, adjuncts, parents, and community members) to develop the self-study, including the budget model for PFA.

Impacts on Operating Budget

Bringing the Preschool for all model to HGCDC will generate additional revenue from the PFA program, improve student retention, and reduce staff turnover. If only 27 students qualify for the subsidy, PSU will pay back the initial investment. In addition, more reliable childcare on campus will help retain students, faculty, and staff.

Measuring Success

Success for this project will be measured through 1) successful application to Childcare For All (CFA) program; 2) revenue generated from CFA program; 3) number of students provided free preschool; and 4) number of new preschool slots available.

Campus Engagement

PSU engaged in a thorough campus engagement process for selecting Tranche 2 sustainability funding proposals, as detailed above on page 8 of this report.

Workforce & Economic Development Projects

Oregon Institute of Technology: Workforce, Community, and Student Needs Assessment

Oregon Tech seeks to utilize its Tranche 2 funding to fund and implement solutions to issues determined by the Workforce, Community, and Student Needs Assessment outlined in the Tranche 1 project identified on page 28 of this report.

Western Oregon University: Doctorate in Occupational Therapy Program

Western Oregon University anticipates prioritizing a portion of its Tranche 2 funding for the university's ongoing investments in its Occupational Therapy Doctorate (OTD) Program.

For more information on WOU's OTD Program, please see page 33 under *Tranche 1 Projects*.

Campus Engagement

WOU plans to launch a survey in early 2024 to seek campus input on Tranche 2 priority projects. While the OTD Program is anticipated to be one of WOU's priority projects, it is likely that other projects not included in this report will also rise to become Tranche 2 priority

projects based on campus input. WOU will finalize all Tranche 2 projects before the 2024 HECC report to the legislature on the financial sustainability funds is finalized.

Portland State University: Game Design & Interactive Media Program

This program aims to meet the rising demand for experts in Game Design and UX/UI Product Design, industries projected to grow at rates of nearly 13% over the next decade with median salaries ranging from \$70-90k. It provides an interdisciplinary curriculum that merges computer science and digital art, ensuring graduates are prepared for versatile, high-earning roles. Notably, this will be Oregon's only four-year Game/Product Design program, keeping prospective students in-state. Graduate of this program will be adept at creating innovative, industry-standard games and products, but beyond just technical proficiency, the program empowers student to contribute meaningfully to Portland's local gaming and tech sectors. It also provides opportunities for students without the means to study out-of-state, ensuring that talent development and retention happen in PSU’s local community.

Project Spending Plan & Timeline

Marketing/Events	\$30,000
Administrative assistant	\$50,000
Recruitment travel	\$20,000
2-year NTTF	\$200,000
Equipment	\$20,000
Visiting lecturers/Speakers	\$12,000
Consultants/Advisors	\$12,000
Summer PreCollege/Certificate Pilots	\$15,000
Summer Continuing Ed Pilots	\$15,000
Total	\$374,000

The project is designed to span two years, beginning in earnest in June 2024. PSU has already begun some preliminary efforts, and the Tranche 2 financial sustainability funding will allow the university to ramp up these initiatives at a greater scale than the pilot efforts. The initial phase will involve developing the full program curriculum, forging industry partnerships, and amplifying awareness and interest of the program within local and student communities.

While the foundational work for this project already started in 2023, the second round of financial sustainability funding is imperative to transition from exploration and piloting to full-scale implementation. With the secured funding, PSU will be able to accelerate its efforts as early June 2024 and continue the work over the next two years, including summers, to fully establish the program.

Impacts on Operating Budget

This project meets an important state workforce need. Portland's tech and gaming sectors are burgeoning, yet paradoxically, students currently need to venture out-of-state to pursue degrees in these fields. This proposed program emerges as a timely and strategic response to address this educational gap. It not only serves the immediate community's needs but also positions PSU at the forefront of academic institutions in Oregon.

Based on PSU's pilot class metrics, the university expects an uptake of 15-20 students in the initial certificate program in fall 2024; growing steadily with the subsequent introduction of a full bachelor's program and strategic transfer pathways, aiming for a robust 80-100 majors by fall 2028. Combined with institutional collaborations and industry partnerships, this will bolster PSU's revenue significantly.

This is a one-time expenditure to set up the program. Once the program is established it will be sustained through student tuition and regular state funding.

Measuring Success

Success for this program will be measured by meeting the enrollment metrics outlined above.

Campus Engagement

PSU engaged in a thorough campus engagement process for selecting Tranche 2 sustainability funding proposals, as detailed above on page 8 of this report.

Portland State University: Career Readiness for Social Mobility in General Education

This project will implement a cultural shift through expanding Career Readiness for Social Mobility to all levels of the general education curriculum. University Studies and PSU's Honors College will partner with the university's Career Center to support faculty professional development in designing and embedding career readiness throughout PSU's curriculum, beginning with General Education.

Outputs include revisions to UNST and Honors syllabi, training, and support for UNST and Honors faculty and mentors for the implementation of PSU's chief goals: to make the learning and transferability of NACE competencies explicitly embedded throughout course activities and curriculum; and communication of the value of this element of PSU's programs to prospective students and the community at large.

By meeting the needs of PSU's students for career readiness tools to increase social mobility, this project will impact all first-year students at the university, providing an equitable and curricular-centered approach. By empowering faculty to develop curriculum, this project creates the conditions for the cultural shift PSU needs to attract and retain students.

Project Spending Plan & Timeline

The total budget for this proposed project is \$557,500. Funding will go toward paying staff, mentors, and faculty for project management, curriculum development, event planning, events, and professional development opportunities. Additionally, resources would support one-time expenses such as a marketing consultant, collateral materials, and website design.

Impacts on Operating Budget

This is one-time funding to support a redesign of curriculum that will serve students and the needs of the state by better preparing students for careers from the beginning of their education at PSU.

This project fills the gap of offering embedded career readiness into PSU's general education curriculum by building equitable opportunities for all students to develop career readiness skills as part of their coursework. Faculty-led and curriculum-based changes create the conditions for a campus-wide cultural shift to center career preparedness and social mobility as key values for PSU's campus.

Measuring Success

Success for this project will be measured through the number of syllabi redesigned to incorporate career readiness, as well as through job placement rates for graduating students.

Campus Engagement

PSU engaged in a thorough campus engagement process for selecting Tranche 2 sustainability funding proposals, as detailed above on page 8 of this report.

Administrative Services & Efficiencies Projects

Oregon Institute of Technology: Strategic Realignment of Finance Systems Subcommittee

The need for data driven decision-making has never been more important for universities in an increasingly competitive higher education environment. Understanding data relationships when allocating resources and prioritizing strategic initiatives is an integral element in an effective Enterprise Resource Planning system (ERPs). Universities must be able to harness the power of business analytics and related decision tools to improve decision-making and monitor key institutional performance statistics.

With a portion of the Tranche 2 financial sustainability funds, Oregon Tech proposes to invest in a leading-edge business and data analytics software application to interface with the newly acquired budget module made possible through Tranche 1 funds.

At the same time, the university would concomitantly invest to optimize systems integration between the Canvas, Slate, and Banner platforms. This optimization will eliminate duplicative, manual work, ensuring more timely and accurate data processing. By streamlining these processes, students, faculty, and staff will benefit from improved services and reduced processing times, allowing them to focus on higher-value activities.

Project Spending Plan & Timeline

Oregon Tech would invest \$250,000 in a robust business data analytics application beginning in spring 2024 and would also use this opportunity to optimize system integrations between key software platforms including Canvas, Slate, and Banner.

Impacts on Operating Budget

This investment will improve cost savings through an improved understanding of relational data through statistical and empirical modeling, while promoting efficiencies in data processing and data driven decision-making. The investment will empower Oregon Tech to make informed choices, optimize resource allocation and enhance overall financial performance. Services will be improved through reduced redundancies and offline data manipulation and will empower end users through improved modality and functionality. Data flows between complementary platforms will be optimized, allowing a more robust data exchange for relational analysis.

Measuring Success

Success for this project will be measured through improved data assimilation and optimized decision-making, improved relational data reporting, and enhanced resource allocations based on empirical data groups that can be tracked and reported as key operational and financial performance indicators.

Campus Engagement

This project has been shared with Oregon Tech's Fiscal Operations Advisory Council, a campus-wide open forum with faculty, students and staff, campus email communications and discussions, and with financial and leadership teams. It has also been discussed and approved by the institutional sustainability funding workgroup, which includes student, staff, and faculty representation.

Oregon Institute of Technology: Banner/Slate Integration Through Axiom Elite

Oregon Tech's Customer Relations Management (CRM) software, Slate, is not fully integrated with its Ellucian Banner student record/business system. This requires many processes, such as navigating applicant data to Banner, to be manual. Oregon Tech seeks to utilize Tranche 2 sustainability funding to fully integrate banner and Slate using Axiom Elite. Axiom Elite is an integration software for higher education that automates data integration between Slate and

Banner, among other systems. Axiom Elite has been a clear standout provider to institutions to integrate Banner and Slate.

Project Spending Plan & Timeline

Oregon Tech seeks to utilize \$115,000 of its Tranche 2 funds for this project. The funds would be spent up front for the implementation fee and five years of annual fees to ensure integration and sustainability. The annual fee also allows for maintenance, updates, and changes as needed.

Impacts on Operating Budget

This is a cost saving measure. Currently, Oregon Tech staff spend approximately 25 hours per week to keep integration running properly. When changes to integration need to be made, including changing processes to improve the student experience, Oregon Tech must initiate a special project with IT which can often take upwards of 30 hours of work per project. This project would save the university approximately \$42,000 in labor costs per year to continue maintenance of integration, plus an additional \$1,000 per special project. Axiom Elite integration would also allow the university to be nimbler and make strategic changes more quickly, which could result in additional enrollments.

Measuring Success

Success for this project will be measured through streamlining the data integration from Slate (where students apply) to Banner (Oregon Tech's Student Information System). This automation will ensure cleaner data, allow the university to be nimbler and make strategic changes quickly, and save many labor hours.

Campus Engagement

This project has been shared with key Admissions and ITS staff. As it does not involve faculty or students, it has not been shared beyond staff departments that will be involved.

Southern Oregon University: Core Information System Replacement – Student Access & Accessibility (CISR-Student)

This project will provide SOU students with better access to key information and services that support their academic progress. Transforming SOU's core information system will allow the university to both reduce ongoing operational costs and greatly improve student-facing processes.

While Tranche 1 financial sustainability funding is supporting SOU in transitioning HR, Finance, and Payroll systems from the legacy system (software based in the 1980s) to modern technology, Tranche 2 funding will allow SOU to complete that transformation in campus

processes by transitioning student-facing software systems. This moves SOU from technology based in 1980s computing to a consolidated, streamlined, and modern technology platform that will improve the student academic experience using real-time/live data for students and those who serve them, combining multiple systems that handle academic planning, registration, degree audit, adviser assignments and interactions, financial aid, and student accounts.

As a result of this transition, employees will be able to assist students more quickly and effectively using a modern platform that has real-time information available in one comprehensive application. The new system will function more intuitively for today's students, supporting their success in registering for classes, meeting with advisors, paying bills, monitoring progress to graduation, and all the many essential technology-based interfaces students must manage in their degree pursuit.

This project leverages the unique opportunity the state has provided by drawing attention to how targeted one-time investments can reset the economic clock at public universities. It also provides a proof-of-concept specific to investment in technology infrastructure at the public universities. SOU will share with its sister universities information on lessons learned, as well as specific artifacts/documents from the system transformation. That will provide sister universities with a jump start on their own transformations, saving time and money across all of Oregon's public universities.

Project Spending Plan & Timeline



Summary Cost Presentation

Below is Alchemy’s time and materials estimate for services to deploy the Workday Enterprise (HCM, Payroll, Financials, and Student). Alchemy is assuming that the project will be deployed 100% remotely, therefore reimbursable travel & expenses are NOT included in the estimated fees.

Deployment Estimate - HCM, Financials, Student	
Function	Estimated Cost
Alchemy Catalyst	\$100,000
HCM, Payroll, Financials - Functional Total	\$1,285,000
HCM, Payroll, Financials - Technical Total	\$625,000
HCM, Payroll, Financials - Project Governance Total	\$512,000
HCM, Payroll, Financials - Change Management Total	\$86,000
HCM, Payroll, Financials - Deployment Total	\$2,508,000
Student - Functional Total	\$2,997,000
Student - Technical Total	\$773,000
Student - Project Governance Total	\$904,000
Student - Change Management Total	\$168,000
Student - Deployment Total	\$4,842,000
Delivery Assurance - HCM, Payroll, Financials	<i>Included in Total Fees</i>
Delivery Assurance - Student	<i>Contracted with Workday</i>
Training	<i>Contracted with Workday</i>
Enterprise Deployment Total	\$7,450,000

*Technical estimate is based on 60 Platform and 93 Student in-scope integrations, of which Alchemy would build 45 Platform and 56 Student Integrations. This number is subject to change upon completion of a detailed integrations discovery with Southern Oregon University.

Cost by fiscal year:

	FY 2023	FY 2024	FY2025	FY 2026
Total Enterprise Cost	\$2,660,000	\$2,680,000	\$1,750,000	\$360,000

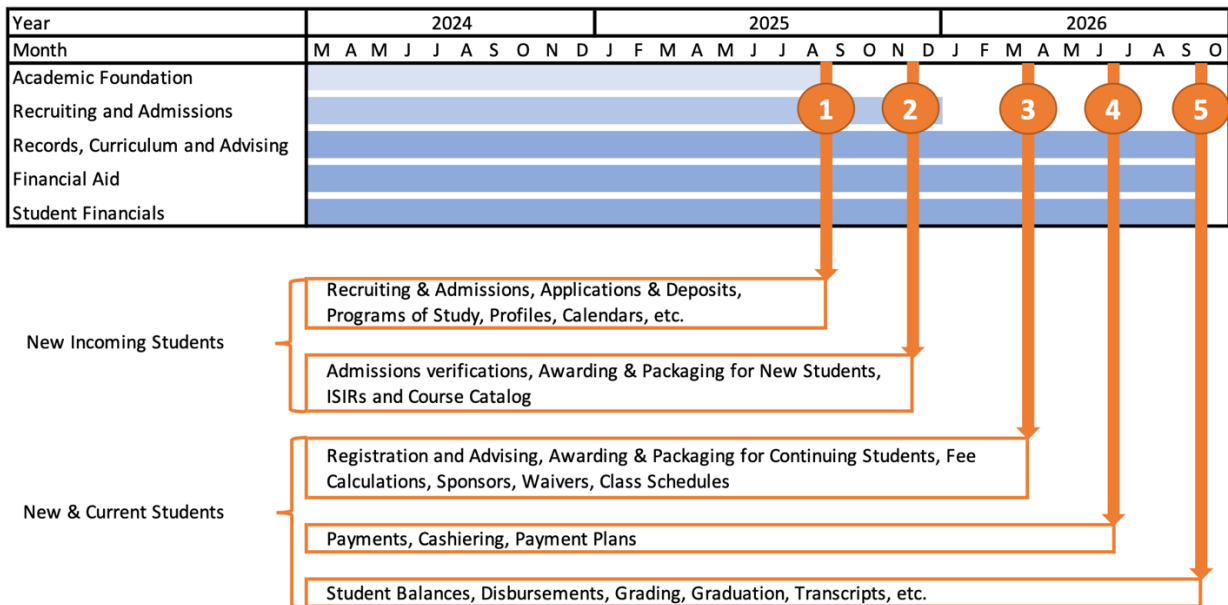
BANNER REPLACEMENT ANTICIPATED COSTS & RETURN (\$M)

	Jul-22	Jul-23	Jul-24	Jul-25	Jul-26	Jul-27	Jul-28	Jul-29	Jul-30	Jul-31	Jul-32	Jul-33	Jul-34	Jul-35	Jul-36
Banner Ecosystem	\$1.40	\$1.42	\$1.44	\$1.51	\$1.56	\$1.60	\$1.65	\$1.70	\$1.75	\$1.81	\$1.86	\$1.92	\$1.97	\$2.03	\$2.09
Workday	\$0.54	\$0.82	\$0.83	\$0.85	\$0.86	\$0.88	\$0.90	\$0.92	\$0.93	\$0.95	\$0.97	\$0.99	\$1.01	\$1.03	\$1.05
Implementation	\$2.66	\$2.68	\$1.75	\$0.36											
Annual Total	\$4.60	\$4.92	\$4.02	\$1.21	\$0.86	\$0.88	\$0.90	\$0.92	\$0.93	\$0.95	\$0.97	\$0.99	\$1.01	\$1.03	\$1.05
Delta (vs. Current)	\$3.20	\$3.50	\$2.58	-\$0.31	-\$0.69	-\$0.72	-\$0.75	-\$0.79	-\$0.82	-\$0.85	-\$0.89	-\$0.92	-\$0.96	-\$1.00	-\$1.04
Project Balance	\$3.20	\$6.70	\$9.28	\$9.64	\$8.95	\$8.22	\$7.47	\$6.68	\$5.86	\$5.01	\$4.12	\$3.20	\$2.24	\$1.24	\$0.19

- Gray cells indicate the annual cost for the Banner Ecosystem if SOU were to not replace it.
- Rose cells indicate the overall annual costs for Banner, Workday and implementation during the implementation period of the project. July
- 2025 is highlighted in red to indicate that early 2025 is where SOU could begin to eliminate portions of Banner.

- This table illustrates the comparison between costs of maintaining the Banner Ecosystem versus replacing it with Workday.
- The numbers used in this table are based on the most recent quotes from Workday, Inc. and Alchemy.
- The Project Balance is inclusive of costs for Workday and implementer through the point where SOU can discontinue its use of the Banner Ecosystem.

SOU SIS-Modernization Timeline



- The numbers on this diagram correspond to the numbered list in the narrative.
- This timeline indicates the major functions horizontally in blue.
- The length of the blue lines indicates the duration of the work associated with the function.
- The orange arrows indicate the "Customer Uptake" points where functionality will be offered to students.
- The boxes outlined in orange describe what functionality will be offered with each uptake.
- To the left of the orange brackets is an indication of what student population will gain access to new system functionality.

Impacts on Operating Budget

The annual fee for the new core information system is approximately half the cost of the current system including the multiple add-on systems necessary to make the aging current system function.

Phases One and Two of SOU's core information system transition (CISR-F/HR and CISR-SIS) together result in direct savings of approximately \$700,000 - \$900,000 *per year*, ongoing. See the above Project Spending Plan for a clear accounting of how this project directly reduces future expenditures. Additionally, staff time gained from efficiencies in Phase Two implementation can then be redirected to better serve students.

Note that the state has recognized technology as a capital investment; the state has provided bonding capacity for Core Information System transformations in other sectors of state government. However, the public university capital process is not currently built to allow the universities to request capital bonding for this purpose. SOU's Core Information System Replacement (CISR) project is akin to rebuilding the electrical/plumbing/HVAC infrastructure for SOU's campus, stemming leaks, and removing inefficiencies to save ongoing costs every day moving forward.

Measuring Success

Success for this project will primarily be measured in cost savings, which is immediately available information.

Secondarily, SOU will be looking for improvements in student retention as another indicator of success, given this modernization is expected to have tangential positive impacts on retention and thus enrollment by continuing students. By making it easier for students to register for classes, schedule advising appointments, review progress to graduation, and access financial aid information, SOU is removing roadblocks to student success. Even small difficulties and barriers can become roadblocks for first generation students who lack familial support in navigating the college environment. Making their electronic interface with the university more akin to a site they recognize, for instance Amazon's website, and less like learning a foreign language, will help smooth the path for them to earn their degree.

Campus Engagement

The Core Information System Replacement was thoroughly vetted with students, faculty, and staff over the course of a year prior to the allocation of the financial sustainability funding. Following presentation of the project concept to the President's Cabinet, the concept was shared, and input was sought from SOU's Faculty Senate, Staff Assembly, and Student Government. During the most recent round of significant budget cuts on SOU's campus, the CISR project was discussed along with other cost savings ideas in an extensive campus conversation involving multiple all-campus meetings.

With the return of faculty and students to campus in the fall, SOU's President Bailey discussed the funding possibilities in meetings with faculty and staff union leadership; with Faculty-Senate; with Staff Assembly; with Associated Students of SOU; and in a live/live-streamed all-campus meeting held on November 16.

In all instances, there was positive discussion about the many needs on campus, ways SOU could utilize the state investment, how those many ideas fit with the parameters for this funding, and what would be congruent with the SOU Forward plan the university has worked so hard, together, to implement.

Portland State University: Unified Digital Ecosystem for Student Communications and Support

The Huron report and results of PSU's annual student experience surveys both articulate the same message: decentralization at PSU has led to extensive inefficiencies that negatively impact students and staff. Two areas where the university sees significant decentralization are in the ways they communicate with students and provide support. Investing in centrally supported tools like Slate CRM for current students will provide opportunities for ongoing cost reduction, efficiency gains, and improved student persistence at PSU.

PSU's recent Slate Feasibility Study demonstrates how Slate CRM can meet the university's needs to manage communication with current students, reduce software costs, and provide an integrated hub for student communication and interaction tracking. The recently funded Virtual First Stop (VFS) initiative will be tightly integrated with Slate, and further investment in VFS will also occur as part of this work.

Project Spending Plan & Timeline

The total budget for this proposed project is \$450,000. Funding will be required for:

- Consultants and temporary staff to provide bandwidth and support during the implementation
- Two years of software licensing to bridge the transition as PSU migrates from existing tools, covering ongoing licensing
- Training and outreach to onboard campus to the new toolset

Staff time will be required from: Office of Information Technology, student services teams, and select administrative units.

Impacts on Operating Budget

This is a one-time investment that will reduce costs and improve student communications, and therefore success. Working from a robust shared toolset will allow units across PSU's campus to collaborate in new and innovative ways, delivering improved service to students. As a result of

this project, less effort will be required to navigate PSU's bureaucracy, email inboxes won't contain irrelevant messages, and issues will be resolved faster. This will reduce the likelihood of negative student impacts such as delayed registration for courses.

Measuring Success

Success for this project will be measured by implementation and adoption of the new tools, as well as a reduction in total annual costs for student communication.

Campus Engagement

PSU engaged in a thorough campus engagement process for selecting Tranche 2 sustainability funding proposals, as detailed above on page 8 of this report.

Portland State University: Merge ID Services Function into OIT

PSU's Student Financial Services (SFS) and Office of Information Technology (OIT) propose merging the ID Services function currently housed in SFS into OIT. This merger will create overall efficiencies for PSU. It will also create an environment that allows for more rapid progress in modernizing the ID card service experience for students and employees.

PSU has an increasing demand for access management and ID services, and improvements to organizational efficiency are necessary to maintain quality services to campus. This change will improve PSU's ability to provide these core services through modern digital ID cards and consolidate administration of access control and ID card services to be managed by OIT and the Campus Public Safety Office (CPSO).

Project Spending Plan & Timeline

The total budget proposed for this project is \$200,000. To complete this initiative efficiently and effectively, PSU will need bridge funding to merge the ID Services student worker activities into the OIT Helpdesk operations. To make this work, the university will need to complete some of the streamlining activities such as uploading ID card pictures and batch printing IDs in advance.

Funding for this project will be applied toward staffing resources to implement the process improvements and automations necessary for long-term success. Funding will also be used for other startup costs and recurring costs that will be covered long term once the transition is completed.

Impacts on Operating Budget

This is a one-time investment that will reduce long-term costs and improve services to students, faculty, and staff. This proposed service reorganization will improve the student onboarding process by reducing the administrative hurdles that students encounter. It will also position

PSU to provide new digital ID card options like using a smartphone to access buildings and services. These changes will improve the student experience, increase security, and streamline operations within these core services.

Measuring Success

Success for this project will be measured through 1) meeting project milestones; 2) cost savings from administrative changes; and 3) improvements in the time required to obtain an ID and access at PSU.

Campus Engagement

PSU engaged in a thorough campus engagement process for selecting Tranche 2 sustainability funding proposals, as detailed above on page 8 of this report.

Portland State University: Operational Excellence

Building upon the two scopes of work concluded with Huron (higher education consultancy), PSU will build structures and processes that lead to operational excellence. The goal of this project is to have effective support structures that reduce university costs through less turnover and duplication of efforts across the university, thus availing resources for mission critical areas.

The consultants concluded a high-level design phase for Academic Affairs for services that could be centralized. This work also highlighted the importance of services currently provided centrally and the need to ensure proper staffing in those. The next step for this project is to determine appropriate staffing, update position descriptions, and perform detailed process mapping for key processes.

Project Spending Plan & Timeline

The total budget for this proposed project is \$500,000. These funds will be spent on staff time and consultants to help complete the tasks described above. Aspects of this project are on-going as PSU continues to look at ways to increase efficiencies. Hiring a consultant or reassigning internal resources to lead this effort would take a few months and would continue through the next year.

Impacts on Operating Budget

This is a one-time expenditure to centralize functions that will reduce costs and improve operational efficiency and excellence.

Through streamlined and effective services, PSU faculty will spend less time on administrative tasks, making more time available for supporting students. Removal of duplication of effort will free up resources to tasks that are in service to students.

Measuring Success

Success for this project will be measured through 1) the completion of process mapping; 2) the rewriting of position descriptions; 3) reassigning staff to central units; and 4) the achievement of cost savings.

Campus Engagement

PSU engaged in a thorough campus engagement process for selecting Tranche 2 sustainability funding proposals, as detailed above on page 8 of this report.

Portland State University: Recruitment Search/Support Pilot

Decentralization of specialized activities at PSU such as search management and recruitment has led to fragmentation of business processes and resulted in departmental staff taking up many elements of this – and other – administrative functions. Providing more central support is one way to free up capacity in departments and allow those resources to be dedicated to departmental and student support.

Project Spending Plan & Timeline

The total budget for this proposed project is \$350,000. Project funds would be used to hire two temporary positions over a two-year duration to explore and demonstrate the value of these services. This would not be an ongoing obligation beyond this timeframe but would enable PSU to make an educated decision about the value of future recruitment support. PSU would deploy HR Partners – experienced HR associates who are already closely associated with departments – to take an active role in search coordination and recruitment.

Impacts on Operating Budget

This is a one-time investment to investigate the potential for cost savings by centralizing and improving services. As a result of this project, departmental resources that are not spent on administrative tasks will be available for other departmental student priorities. If the pilot is successful, searches will be conducted more efficiently by central HR, reducing search costs.

Measuring Success

Success for this project will be measured through an analysis of the pilot project, including satisfaction of users of the central search services, as well as through cost reductions compared to decentralized searches.

Campus Engagement

PSU engaged in a thorough campus engagement process for selecting Tranche 2 sustainability funding proposals, as detailed above on page 8 of this report.

Portland State University: Financial Sustainability Funding Project Management

PSU seeks to hire a temporary project manager to track sustainability funding projects, embed accountability and feedback, and develop any necessary reports for the HECC.

Project Spending Plan & Timeline

PSU has budgeted \$120,000 for this position. This is intended to be a half-time position at PSU over two years.

Conclusion

The financial sustainability funding allocated to PSU and the TRUs by the legislature can serve as a spark for transformative change among Oregon's public universities. The TRUs and PSU have worked collaboratively over the last four months to feed that transformative fire – learning from, collaborating with, and supporting each other in this work. The universities have determined not only the priority financial sustainability projects on their own campuses, but also the types of projects which should be prioritized: enrollment, student success and retention, administrative services and efficiencies, and workforce and economic development.

By prioritizing student-centered investments, these initial Tranche 1 proof-of-concept initiatives point the way toward how a relatively small investment can lead to transformative change on the campuses of Oregon's TRUs and PSU. Many of the proposed Tranche 2 projects plan to build upon the success of these initial investments, while others will introduce new initiatives focused on ensuring equitable student success.

Ultimately, the intent of this funding is to help the five universities achieve long-term financial sustainability. While the emerging enrollment and economic realities make sustainable income and the ability to finance the university's needs a challenge for many of Oregon's universities, these projects were selected for funding because they have the ability to not only help increase enrollment and prioritize student needs, but also because they have the potential to create transformative, long-term change on each campus. In addition, many of the selected projects will result in significant cost savings for the universities.

This work remains ongoing. PSU and the TRUs continue to engage with the HECC workgroup on financial sustainability. That workgroup will continue this conversation around the priority projects at each university and the HECC will ultimately make the recommendation to the legislature to fund the Tranche 2 projects outlined above. A failure to fund the Tranche 2 projects proposed by the five universities would be a missed opportunity for Oregon's universities and students, who have worked together to identify critical, student-centered initiatives. The five recipient universities welcome those ongoing discussions, as well as the recommendation from the HECC, and look forward to beginning work on these important Tranche 2 initiatives.