



2023–25 OREGON PUBLIC UNIVERSITIES' **CONSOLIDATED FUNDING REQUEST**

APRIL 20, 2022

EASTERN OREGON UNIVERSITY

OREGON STATE UNIVERSITY

OREGON INSTITUTE OF TECHNOLOGY

PORTLAND STATE UNIVERSITY

SOUTHERN OREGON UNIVERSITY

UNIVERSITY OF OREGON

WESTERN OREGON UNIVERSITY



2023–25
OREGON PUBLIC UNIVERSITIES'
**CONSOLIDATED FUNDING
REQUEST**

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Oregon Public Universities'
Consolidated Funding Request
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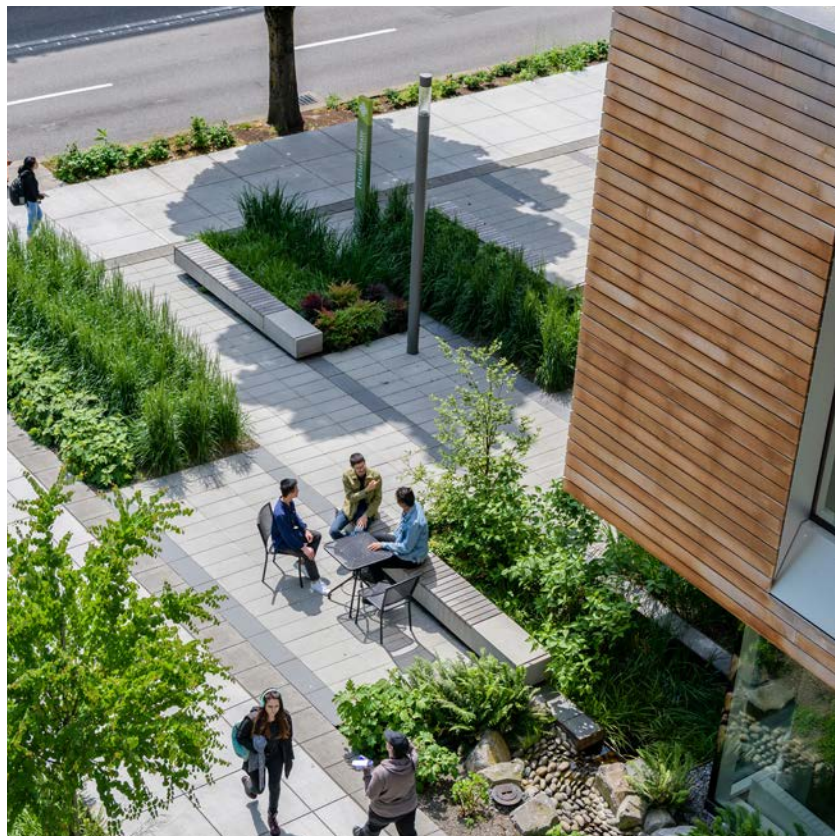
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Oregon Public Universities'

2023–25 Consolidated Funding Request



Executive Summary

The 2021–23 biennium brought enormous unforeseen challenges to Oregonians, including students and their higher education institutions. Throughout the pandemic, Oregon public universities have prioritized the health and safety of students, faculty, and staff, and focused on keeping students on course to complete their degrees. In doing so they have been accountable to accreditors, to the state via the Higher Education Coordinating Commission (HECC), and to Oregon and its citizens via their governor-appointed, senate-confirmed governing boards. This funding request has been developed with those parties in mind.

University Base Funding, the amount of state resources needed to continue delivering existing programs and learning outcomes, is calculated at \$978 million for the 2023–25 biennium. To arrive at University Base Funding, the public universities each calculated their costs for the coming biennium, compared calculations to ensure consistency, then totaled the data into the amount requested for the Public University Support Fund (PUSF). University Base Funding covers anticipated cost increases due to health care, retirement, and other employee benefits; collective bargaining agreements; and

general inflation on supplies and services. It includes continuation of the Benefits navigator positions required by HB 2835 (2021) but does not include any new investments.

The universities have a finite set of options to manage institutional budgets if University Base Funding is not secured. Potential options include personnel actions such as pay cuts, furloughs, and layoffs (only to the extent such actions are not precluded by collective bargaining agreements); hiring freezes; and holding unfilled positions open. While universities will work to minimize the impacts of these cuts to student success, there will be such impacts nonetheless. Net tuition revenue represents around 65 percent of universities' operating revenues, and it is untenable to expect a greater share of costs to be covered by student tuition.

In addition to University Base Funding, the universities are requesting \$20 million in continuing support for Strong Start/summer bridge programs. These programs, quickly developed in the summer of 2021 to assist entering students who had been negatively impacted by interrupted/remote learning during the pandemic, are providing critical transition and wrap-around services for the most vulnerable and traditionally underserved students as they begin their higher education journey. Unfortunately, we expect that the learning lost during the pandemic will impact incoming classes for years to come.

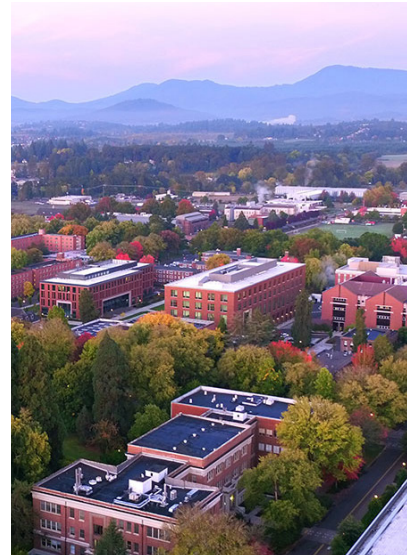
While the universities have made gains in closing achievement gaps for traditionally underserved students, these efforts have been piecemeal rather than what could be achieved through consistent funding. Now is the time to align our efforts against longstanding and pandemic-exacerbated socioeconomic disparities. We must focus on supporting diverse students in getting in, getting through, and getting out. Therefore we are requesting \$50 million Equity Achievement Investments. Targeted investments can help close the persistent gaps between students who have traditionally been represented on university campuses and those who have historically been underserved.

The public universities also request the same 8.67 percent base funding increase for State Programs and Statewide Public Service Programs, plus a restoration provision for both appropriation categories to address a shortfall in funding from the 2021–23 biennium. In total, this request is a 10 percent increase for the State Programs and 10.1 percent for the Statewide Public Service Programs.

The universities seek the full statutory 1 percent funding for Sports Lottery, critical for scholarships for student-athletes and graduate students.

Finally, the universities are requesting an additional \$50 million for the Oregon Opportunity Grant (OOG) to fund the state's ambitious goals to increase the number of Oregonians attending and finishing college. Approximately 15,000 students who qualify for the Federal Pell Grant are unsupported by the OOG due to underfunding. Because the grant covers approximately 10 percent of the total cost of attendance, many students are unable to attend even if they qualify and are awarded a grant.

Together these investments will bring Oregon closer to delivering on the promise of an equitable path to success for all Oregonians.



Introduction

In 2020, public universities submitted a consolidated funding request (CFR) articulating the importance of maintaining funding for our institutions and student financial aid to protect the current generation of students and preserve the opportunity to participate in post-secondary education.

Two months into the COVID-19 pandemic, state economists were projecting massive revenue losses that imperiled state services. With history as our guide, universities braced for significant budget cuts and reductions for a student body much more diverse than in 2008 when the Great Recession caused dramatic cuts to higher education in Oregon.

Fortunately, Oregon's economy quickly recovered. While Oregon families and employers continue to confront the highest inflation in 40 years, state revenues are now exceeding pre-pandemic projections. Revenue growth combined with federal dollars allowed lawmakers to make investments in colleges, universities, and student financial aid in 2021 to particularly remediate pandemic impacts. However, even with this funding assistance, students in Oregon still struggle to attend public universities, and too many are forced to balance basic needs including housing and food against the cost of tuition.

In 2020, the focus of our request was sustainable funding to protect a new generation of students. Today, we seek investments to help address persistent equity gaps between white and BIPOC students in enrollment, retention, and completion. The data are clear: the demographic makeup on our campuses has changed; now it is incumbent upon us to focus attention and resources toward cultivating a new generation of learners so they can persist, complete their education, and join the workforce in Oregon. Oregon families are relying on this effort to provide economic opportunity, and Oregon employers are eager to embrace skilled, knowledgeable, and diverse graduates.

As we collectively navigate toward and into a new endemic phase of the COVID-19 pandemic, we continue the work to dismantle institutional racism and embrace the next generation of students.

Partners in Economic Prosperity and Recovery

Since the establishment of the Morrill Act in 1862, America's public universities have been integral partners in helping society move beyond crises and chart a course to prosperity. Across Oregon, public universities serve as anchors for economic activity in our respective communities. Combined, Oregon's public universities employ over 40,000 Oregonians in family-wage jobs that provide healthcare and retirement benefits that exceed those offered in other sectors of the economy. OSU Extension partners with communities in every county to provide information, services, and expertise to meet local challenges and help every Oregonian thrive. Public universities supply the workforce for Oregon's employers, offering degrees in science, technology, engineering, mathematics (STEM), and public health, as well as education, journalism, business, law, and the liberal arts—all continually adapted to meet the workforce needs of the 21st century. Public universities also engage in research that sparks innovation, business creation, and growth for Oregon.

Nexus Between Increased Investment in the PUSF and the HECC's Strategic Roadmap

The investments outlined in this consolidated funding request advance the goals of the Strategic Roadmap for Oregon Postsecondary Education and Training adopted by the HECC in August of 2021. By providing funding in the PUSF to help campuses manage increasing costs, making investments in student financial aid, continuing programmatic investments such as Strong Start programs and benefits navigators, and advancing Equity Achievement Investments—the universities and Commission can partner to benefit all Oregon students.

In addition to making progress in closing persistent equity gaps in enrollment, retention, and completion, these investments—particularly those included in the Equity Achievement Investments—will allow universities to focus efforts on ensuring that students are completing with a certificate or degree, as well as a plan for entering the workforce and serving the needs of their families and Oregon employers.

The Preamble to the Roadmap asks that Oregonians and institutions of higher education “replace our habit of asking, ‘Are students ready for college?’ with a different question: ‘Are colleges ready for students?’” If realized, the investments included in our funding request will move Oregon forward and closer to ensuring that the answer to the question “are colleges ready for students?” is “yes” and applies to those communities traditionally served by universities, and the emerging majority of Indigenous communities, immigrants, and others from diverse racial and ethnic backgrounds.

COVID-19 Impacts

In late February, 2020, Oregon confirmed its first known case of the novel corona virus. This occurred as the State of Washington became the United States' first hot spot for COVID-19 infections. That same month, Oregon's public universities began to make plans for how they would manage academically and financially through a global pandemic in which we could not operate as residential campuses for at least the remainder of the academic year.

On March 19, 2020, Governor Kate Brown issued Executive Order 20-09 directing public and private colleges and universities in Oregon to shift to remote instruction beginning March 21, 2020, and extending through April 28, 2020. On April 17, Governor Brown extended Executive Order 20-19 to June 13, 2020.



The public universities' first priority throughout this crisis has been to ensure the health and safety of students, faculty, and staff while continuing to deliver high-quality instruction to keep students on course to graduate.

The first wave of impacts from COVID-19 was felt almost immediately. Within seven days—and through the tireless effort of faculty and staff working during spring break—classes shifted to predominantly remote instruction and students were encouraged to remain in residence halls only if they did not have another safe option for housing. As a result, on-campus student populations dropped precipitously during the month of March 2020, and we saw many of our residential campuses empty.

The reduction of on-campus student populations resulted in a significant loss of revenue in auxiliary budgets. Public universities do not often focus on auxiliary units when working with policymakers or the HECC because they are primarily self-funded and self-sufficient—separate and apart from the Education and General (E&G) fund. Auxiliary budgets include student housing, dining services, student unions, parking, athletics, and other revenue-generating units on campuses. In fall of 2020, auxiliary enterprises accounted for 78 percent of lost revenues due to the pandemic. The net revenue losses forced campuses to engage in a variety of cost-cutting measures, including temporary pay reductions and laying off or furloughing staff until students were safely able to return to campus and their work resumed. These efforts took on different forms across the campuses but, by utilizing extended leave programs, the federal work share program, and collaborating with employee groups, universities were able to avoid significant permanent staff reductions and preserve health care benefits for nearly all employees.

Two Examples of Campus Employee Actions

University of Oregon Extended Benefits Program: In April 2020, the University of Oregon (UO) began informing 282 employees of changes to their employment status—a move designed to protect the financial health of the university given that revenue from on-campus auxiliary services had dropped by over \$25 million that spring. In consultation with employment groups, UO developed an alternative to layoffs that was designed to preserve employment relationships, provide financial stability, and ensure continued access to health insurance. This program—called the UO Extended Benefits Program—was designed to retain a connection with impacted employees to meet the goal of bringing them back to campus when work returned to campus. All impacted employees received a minimum 30-day paid notice and were then enrolled in the UO Extended Benefits program through August 31, 2020. During this time, employees were on leave-without-pay status. Employees in the UO Extended Benefits Program were able to apply for unemployment insurance benefits and the UO continued to pay its portion of each employee’s health insurance premiums. For a good number of employees, the combination of expanded unemployment insurance benefits and continued health insurance coverage kept them financially whole during that period. By preserving this employment connection, UO was able to bring back employees quickly when students returned to campus.

Workshare Program at Southern Oregon University: SOU initiated Workshare on May 1, 2020, and continued 20–40 percent furloughs for classified and unclassified administrators until September 4, 2021. Initially, 333 employees were enrolled in the program, and the labor savings enabled the university to weather decreased revenues. All employees retained full medical and retirement benefits and a separate hardship leave bank was also established.

Fortunately, the federal government, through three separate legislative actions (CARES Act, CRRSAA, and ARPA), ultimately provided to Oregon’s public universities over \$149.4 million to be directly passed through to students as well as \$195.7 million in institutional support for lost revenues and specific pandemic costs. A summary of the federal relief packages and permissible uses of the funds can be found in Appendix A (page 40).

Federal funding has been incredibly important to the universities’ ability to manage through the crisis. However, it was not sufficient to address the entirety of the impact. Table 1 (page 9) shows the projected financial impact of the pandemic from inception through June 30, 2022. Overall, the full impact is lost gross revenues (with estimated tuition loss net of remissions), before any mitigating actions were taken, plus direct COVID-related expenses. The second column shows available federal resources for institutions. The last column calculates the gap between total impact and federal resources, reflecting what universities’ leadership has been managing through the use of personnel actions (i.e., temporary pay reductions, hiring freezes, layoffs, and furloughs), expense reductions, and use of reserves if available.

TABLE 1

Pandemic Financial Impact to Institutions Includes: lost gross auxiliaries revenues, lost tuition revenues net of remissions, direct pandemic expenses (technology, enhanced cleaning, personal protective equipment, testing/tracing, COVID sick leave, classified staff pandemic pay etc.) Excludes: \$149.4 million of direct HEERF support passed through to students				
University	Cumulative Impact Estimated Through 6/30/22 (a)	HEERF Institutional Resources (b)	Net Gap Addressed with Mitigating Operational Actions (c)	
EOU	\$ 7,963,987	\$ 5,004,419	\$	(2,959,568)
OIT	\$ 24,500,000	\$ 7,745,034	\$	(16,754,966)
OSU	\$ 201,113,891	\$ 49,121,568	\$	(151,992,323)
PSU	\$ 88,416,006	\$ 61,968,827	\$	(26,447,179)
SOU	\$ 35,946,203	\$ 12,081,360	\$	(23,864,843)
UO	\$ 221,756,360	\$ 45,540,929	\$	(176,215,431)
WOU	\$ 37,244,046	\$ 14,238,948	\$	(23,005,098)
	\$ 616,940,493	\$ 195,701,085	\$	(421,239,408)
a) Cumulative impact estimates <i>include revenues and costs that were not allowable under narrow federal reimbursement calculations</i> ; once tracked losses and expenses reached level of federal reimbursements, some institutions did not have staffing bandwidth to continue to isolate and track detailed pandemic impacts, so cumulative impacts might be understated				
b) Higher Education Emergency Relief Fund (HEERF) Resources include the <i>institutional</i> support in all three major legislative actions (CARES Act, March 2020; CRRSAA, December 2020; ARPA March 2021); <i>not all lost revenues or direct expenses were eligible for reimbursement</i>				
c) Universities addressed/are addressing the remaining financial gap through personnel actions, expense reductions, and use of reserves if available				

For additional detail regarding federal relief, Table 2 (page 10) reflects the total federal resources awarded and amounts drawn down to date. It reflects the usage of federal relief programs to address the larger negative financial impact reflected in Table 1. Each federal act specified which lost revenues, if any, and which direct expenses were allowable for reimbursement. It has been important for universities to thoughtfully and strategically plan when to draw funds and for which specific costs.

Universities also had to plan carefully for how to spread student aid across as many terms as possible to provide more stable support for students throughout the pandemic. As noted below, impacts will continue into future fiscal years. Spreading the federal support across budget cycles supports more intentional financial planning. As the pandemic evolved, policymakers recognized that providing additional flexibility around when funds were used was prudent and helped protect institutional viability and student success.

FIGURE 1

**Management of Pandemic's Institutional Impact -
\$616.9 Million from Inception Through June 30, 2022**
(in millions)

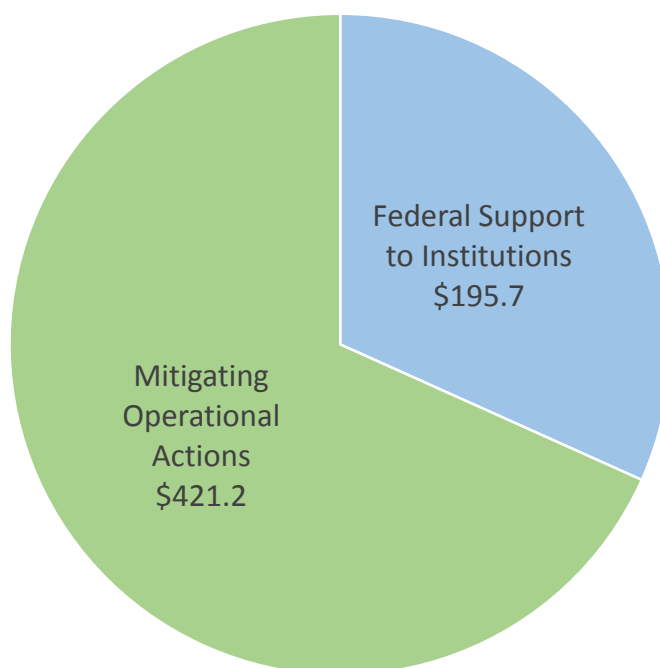


TABLE 2

All Higher Education Emergency Relief Fund (HEERF) Appropriations Combined (CARES, CRRSAA, ARPA)				
University	Direct to Student Dollars	Institutional	SIP* Institutional	Grand Total
FEDERAL FUNDS AWARDED				
EOU	\$ 3,621,720	\$ 4,652,112	\$ 352,307	\$ 8,626,139
OIT	\$ 5,541,977	\$ 7,745,034	\$ -	\$ 13,287,011
OSU	\$ 39,357,681	\$ 48,901,794	\$ 219,774	\$ 88,479,249
PSU	\$ 43,978,699	\$ 57,454,964	\$ 4,513,863	\$ 105,947,526
SOU	\$ 8,951,477	\$ 11,646,106	\$ 435,254	\$ 21,032,837
UO	\$ 37,521,605	\$ 45,540,929	\$ -	\$ 83,062,534
WOU	\$ 10,468,254	\$ 13,184,384	\$ 1,054,564	\$ 24,707,202
Total	\$ 149,441,413	\$ 189,125,323	\$ 6,575,762	\$ 345,142,498
FUNDS DRAWN TO DATE (As reported through December 2021)				
Total	\$ 85,586,281 57.3%	\$ 115,635,287 61.1%	\$ 1,346,705 20.5%	\$ 202,568,273 58.7%
BALANCE (Universities have until June 30, 2023 to draw funds)				
Total	\$ 63,855,132 42.7%	\$ 73,490,036 38.9%	\$ 5,229,057 79.5%	\$ 142,574,225 41.3%
<i>*Each bill separately provided additional institutional support in Strengthening Institutions Programs (SIP) funding.</i>				

Direct Support for Students

The federal government required that the emergency assistance in CARES and the American Rescue Plan be split evenly between direct assistance to students and institutions. Institutions are required by law to prioritize students' financial need in making emergency grants under HEERF II and HEERF III.

Students were and are eligible for emergency grants through their institutions or traditional financial aid channels to meet unexpected and urgent needs related to COVID-19 impacts, such as expenses related to food, housing, course materials, technology, health care, and childcare. Students who are currently participating in the Federal Work Study program can continue to receive work-study payments from their institution if they are unable to work due to workplace closures.

Enrollment Impacts of COVID-19 Pandemic

The immediate effects of the pandemic will compound over time. Reductions to specific student cohorts that interrupted their academic participation or elected not to enroll following high school, will impact universities' revenues over the following four to six years. For example, the UO saw a decrease of more than 600 first year students in the fall of 2020 due to the pandemic. They project that this decrease in first year students will have the following revenue impact in the years to come:

AY 2022–23	\$15,330,160
AY 2023–24	\$13,677,675
AY 2024–25	<u>\$1,733,676</u>
	\$30,741,511

How Universities have Served Communities

Throughout the pandemic, Oregon's public universities demonstrated their commitment to serving communities by deploying resources to help the state address the public health crisis. Examples abound and include providing community testing, contact tracing support, and sequencing of positive COVID-19 samples. This engagement by our public universities is another example of the ongoing community service role played by public higher education, and the value of having research universities ready to serve the state in times of crisis.

Community Prevalence Testing: TRACE-COVID-19 is a public health project conducted by Oregon State University (OSU) to obtain timely information about the prevalence and spread of the virus causing COVID-19 in Oregon communities. At the invitation of county health officials and community leaders, a TRACE team tests a representative sample of individuals in those communities to determine the prevalence of the virus. The team also tests community wastewater to evaluate the abundance of the virus in the whole community. Further, the team analyzes the genetic code of the virus from these samples to better understand how the virus travels and to inform public health measures.

Since April 2020, TRACE has conducted door-to-door testing in several communities around Oregon as well as on OSU campuses and facilities in Corvallis, Bend, and Newport. The resulting information has helped county, state, and OSU leaders make informed decisions about how best to slow the spread of the virus and minimize the impacts of the disease.



Producing Personal Protective Equipment for Frontline Medical Workers: In Spring 2020, students at the Oregon Institute of Technology (OIT) Portland-Metro campus spent their spring break using 3D printers to create protective face shields for frontline medical workers. Faculty then completed assembly of the face shields and sent them to a variety of locations throughout Oregon. Alumni of OIT also reached out to OIT to request orders for their places of employment. The project was made possible by a grant from The Ford Family Foundation and donations from HP and ASOIT Portland-Metro.

Reducing Equity Gaps by Training Bilingual Contact Tracers: Despite making up only 13 percent of the state's population, Latinos represented 39 percent of all coronavirus cases late in the summer of 2021. Roberto Orellana, a professor with Portland State University's (PSU) School of Social Work, found Latinos in Oregon were more than five times as likely to get COVID-19 as the white population. With funding from the Oregon Health Authority and federal dollars from the CARES Act, Orellana was able to design a training program for PSU students to better respond to the Latino community. Sixty-five students in the School of Social Work received contact tracing training from Johns Hopkins University, supplemented with culturally tailored bilingual training from PSU. Nearly all the students were Latino and bilingual—vital to the support they offer to the struggling community because students were able to use their lived experience to inform their responses for culturally tailored contact tracing. Participating students were also able provide community education and work on COVID-19 prevention strategies, including COVID-19 vaccine dissemination.

2021-23 Funding and Policy Actions

The PUSF has received important increases since 2015 that are helping to restore per student state funding to the levels they were at prior to the Great Recession in 2008 on a real versus nominal basis. However, as reflected in Table 3 (below), the increases are making modest inroads in the overall percentage of state support for public universities as compared to total E&G.

TABLE 3

Public University Support Fund (PUSF)									
2007-09 Final* LAB ¹	2009-11 Final* LAB ¹	2011-13 Final* LAB ¹	2013-15 Final* LAB	2015-17 Final* LAB ³	2017-19 Final* LAB	2019-21 Final* LAB	2021-23 Through 2022 Session	2023-25 Request Development	
								University Base Costs	Request
\$ 568,487,771	\$ 522,352,575	\$ 450,531,927	\$ 522,845,511	\$ 666,900,000	\$ 736,898,583	\$ 836,898,583	\$ 900,000,000	\$ 978,000,000	\$ 1,028,000,000
+ ARRA ² : 55,636,352	+ ARRA ² : 70,823,654	-	-	-	-	+ CARES/CRRSAA/ARPA ⁴ : 97,850,543	97,850,542	-	-
\$ 624,124,123	\$ 593,176,229	\$ 450,531,927	\$ 522,845,511	\$ 666,900,000	\$ 736,898,583	\$ 934,749,126	\$ 997,850,542	\$ 978,000,000	\$ 1,028,000,000
	-5.0%	-24.0%	16.1%	27.6%	10.5%	26.8%	6.8%	7.5%	5.1%
<u>Biennia to Biennia Change (Without federal stimulus funding):</u>									
\$ Change:	\$ (46,135,196)	\$ (71,820,648)	\$ 72,313,584	\$ 144,054,489	\$ 69,998,583	\$ 100,000,000	\$ 63,101,417	\$ 78,000,000	\$ 128,000,000
% Change:	-8.1%	-13.7%	16.1%	27.6%	10.5%	13.6%	7.5%	8.7%	14.2%
* "Final" legislative budgets are end-of-biennium actual appropriations inclusive of any mid-biennium reductions, Emergency Board (E-Board) actions, and one-time funding									
1) For biennia prior to 2013-15, E&G appropriations are retroactively split into PUSF and State Programs for comparability with subsequent biennia									
2) For 2007-09 and 2009-11, E&G funding included federal stimulus funds passed through the state for operational support									
3) For 2015-17, E&G funding excludes \$427,500 of one-time funding for career pilot program that ran through PUSF									
4) Between March 2020 and March 2021, three separate federal programs awarded Higher Education Emergency Relief Funds (HEERF) to the universities; the total awarded in all three programs is allocated equally between the two biennia in which funds can be spent									

2021 Investments

Record revenue growth and federal pandemic relief funds gave Governor Brown and lawmakers significant resources to address critical needs across state government, including investments in the PUSF and the OOG. Additionally, the legislature funded some first-time programs that are already positively impacting student success, particularly for traditionally underserved students. These new investments included benefits navigator positions on college and university campuses and funding for Strong Start/summer bridge programs to serve high school students impacted by pandemic learning disruptions.

Public University Support Fund

Lawmakers funded public universities' operating budget request by allocating \$900 million to the PUSF. This was a 7.5 percent increase, and a \$63 million increase above the 2019-21 budget. This critical funding helped provide much needed stability during the financial disruption of the COVID-19 pandemic and allowed most institutions to keep tuition increases for resident undergraduate students below 5 percent for both years of the biennium.

Capital Construction

The legislature approved an unprecedented \$337.1 million of Article XI-G and Article XI-Q bonds to finance seven public university projects and make significant investments in capital improvement and renewal funding for all university campuses.

Benefits Navigator

As housing costs skyrocket and childcare resources continue to be in high demand, students today face enormous challenges. Supporting student success means addressing the total cost of attendance, not simply tuition and fees as we have done in the past. House Bill 2835 (2021) created benefits navigator positions on each public university and community college campus. These critical new positions assist students in accessing resources to cover necessities, from housing and food to childcare and transportation.

Strong Start/Summer Bridge

COVID-19 caused disruptions in high school and community college instruction with long-term impacts on academic and developmental growth affecting incoming university students. In 2021, the Oregon Legislature appropriated federal and state funds for a Strong Start program at the public universities to reduce this preparation gap. While each university tailored its Strong Start program to meet the unique needs of their students and their current capacity to offer a new program, there were several important shared parameters that included:

- Focusing on serving BIPOC students and students from underserved communities,
- Summer bridge kickoff and continuing wrap-around services throughout the school year,
- Academic skill building focus,
- Provision of other student success skills, and
- Creation of a community of support for the students.

Initial Results

Universities moved rapidly to set up programs, compressing the normal design, development, and student recruitment period from 12 months to eight weeks. One campus, OIT, was unable to complete this compressed planning and implementation process for fall 2021 but did implement a pilot program and is strongly committed to Strong Start in 2022. While public universities will continue to work with HECC to coordinate data collection through the remainder of the academic year, we have seen the following initial results:

- Strong Start participants consistently had a higher retention rate than students who did not participate; SOU showed a 19-point higher retention rate,

TABLE 4

	Fall to Winter Retention		Fall GPA		Fall Credits Completed	
	Strong Start	Not Strong Start	Strong Start	Not Strong Start	Strong Start	Not Strong Start
EOU	88.0%	91.0%	3.30	3.00	14.1	12.3
OSU	98.9%	96.7%	3.21	3.08	12.8	12.4
PSU	84.0%	77.0%	2.57	2.11	17.0	11.0
SOU	82.0%	63.0%	3.01	2.99	14.8	11.1
UO	98.0%	96.0%	3.21	3.22	13.6	14.0
WOU	96.0%	89.0%	2.76	2.83	14.3	13.0

- Strong Start participants consistently earned a higher GPA at the end of fall term; participating PSU students had a GPA that was almost a half of a letter grade higher, and
- Strong Start participants consistently completed more credits in fall term; PSU students completed six credits more than non-participants.

It has become clear that the pandemic has long-term impacts, with the risk of those becoming multi-generational impacts. Given this circumstance and the positive indications coming from the initial state investment, the universities are requesting the one-time Strong Start funding be converted into ongoing support within the State Programs. The 2023–25 Strong Start request is \$20 million.

House Bill 2590 Task Force

House Bill 2590 (2021) established a legislative task force focused on the needs of traditionally underrepresented students in higher education. Spearheaded by Representative Teresa Alonso León (D-Woodburn), the bill has launched a campus and statewide listening tour to hear from prospective, current, and former students; campus staff; and others about the challenges and barriers facing students of color, rural, LGBTQIA, and other students who have traditionally had limited access to a postsecondary degree. Universities are engaged with staff from the Legislative Policy and Research Office to support task force visits to our campuses this year.

Addressing Persistent Equity Gaps for Oregon Students

COVID-19 has disproportionality impacted communities of color—their physical, social, and financial well-being. The pandemic continues to exacerbate socioeconomic disparities across all demographics, across all of Oregon. Investments in public universities promote equity, increase opportunity and, if utilized effectively, can erode income inequality.

The increasing diversity in Oregon is reflected in the 130,000 students that enroll at Oregon's public universities. As of 2019:

- 1 in 3 are students of color,
- 1 in 5 are first generation students,
- 2 in 5 receive need-based grants,
- 3 in 5 are unable to meet expenses.

First-generation, Pell-eligible, and traditionally underserved students face new and different challenges. Studies show they are more likely to be at a disadvantage before they even step onto campus. Robust student services and affordable tuition are critical to their success. Many face profoundly disruptive housing and food insecurity that threatens their education. Empowering the new generation of Oregon university-bound students will uplift communities and help address systemic inequities that have pervaded Oregon since its founding.

Oregon's seven public universities join the HECC in reaffirming our shared commitment to equity, access, and quality for students, faculty, and workers.

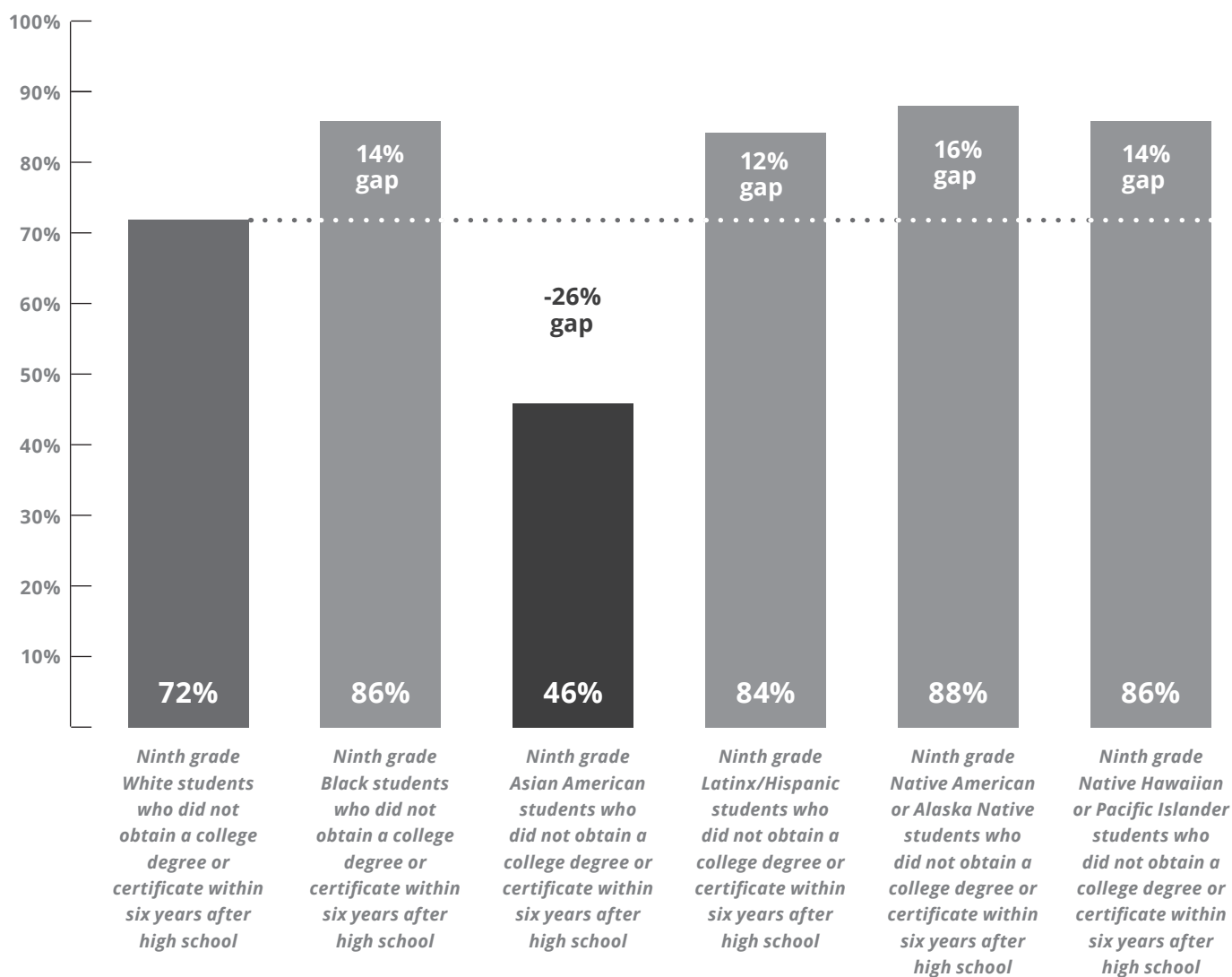
Through the transformative power of learning, we can emerge from the pandemic a stronger more resilient state. A college degree is a proven tool toward financial mobility. The willingness of policymakers to commit resources to protect the state's fragile cradle-to-career public education system may determine if the impact of COVID-19 is measured in years or in generations, and is remembered primarily as a public health crisis or a driver of further systemic inequity.

It is a pivotal moment. More than ever before, we must offer steady, supported pathways out of poverty for our most severely impacted citizens and provide hope for all Oregonians across the state. Oregon's public universities are committed partners in reimagining a better tomorrow. The work is well underway; business as usual is not an option. We must rediscover our confidence and commitment to justice, to address systemic equity gaps that persist.

Persistent Equity Gaps Exacerbate Societal Inequities: BIPOC and traditionally underserved students are too often not set up for success in ways that are equitable to their white peers when it comes to enrollment, retention, completion, and career placement. Using data from the Oregon Department of Education, the HECC has quantified the percentage of 9th grade students from various demographic backgrounds who did not obtain a college degree or certificate within six years after high school. With the exception of Asian American students, the more than 10 percent gaps seen between BIPOC and white student outcomes show evidence that these populations are not being equitably served.

FIGURE 2

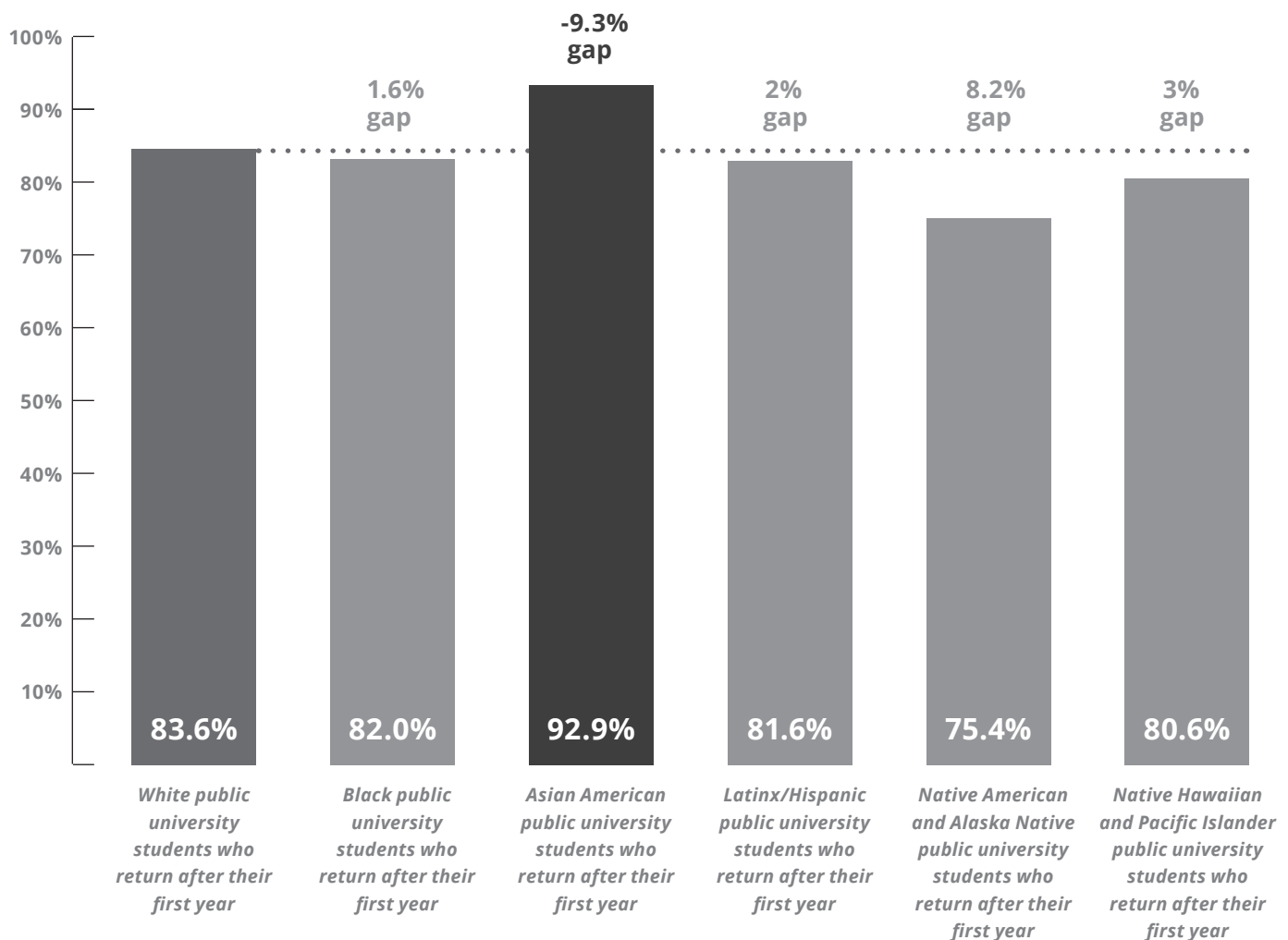
Comparing Six-Year Degree Completion Post High School



Historically Underserved Students Have Lower First-Year Retention Rates Than Their White Peers: Numerous academic studies have confirmed what faculty, staff, students, and families know to be true—persistence between the first and second year of attending a university is a statistically significant predictor of whether or not a student will complete and earn a degree. Figure 3 (below) uses HECC data analysis to demonstrate the reality that among public university students in Oregon, white students have consistently higher first-year retention rates than their BIPOC peers.

FIGURE 3

2019–20 Retention Rate



University Base Funding through the PUSF, State Programs, and the OOG provide a foundation, but targeted investments are needed to ensure campuses can make sustained progress at closing these gaps and allowing all students to realize their full potential. Therefore, we are requesting Equity Achievement Investments to better serve the increasingly diverse emerging majority.

A Culture of Accountability

Oregon's public universities are held accountable to the state and the students who support and fund operations in several ways. Public universities are accountable to accreditors, to the state via the HECC and through other transparency requirements. Lastly, public universities are held accountable to Oregon and its citizens through the oversight that is provided by governor-appointed, senate-confirmed local governing boards.

Accreditation: All of Oregon's public universities are accredited by the Northwest Commission on Colleges and Universities (NWCCU). Attaining and maintaining an accredited status indicates that the university meets or exceeds criteria for quality that is evaluated through peer review. Accreditation requires an ongoing and comprehensive assessment and review of academic and institutional quality. It addresses university finances, assessing whether the university has the necessary resources to achieve its mission, that it is substantially doing so, and that it will continue to do so in the foreseeable future.

Institutional integrity is also addressed through accreditation. Reviews are structured as a cyclical process of continuous improvement. NWCCU accreditation occurs on a seven-year cycle that consists of four parts: annual reports; mid-cycle self-review and peer review in the third year; policies, regulations, and financial review in the sixth year; and evaluation of institutional effectiveness through self-review and peer review in the seventh year. Additional information on the process and requirements to be accredited by the NWCCU can be found at nwccu.org.

State Level: At the state level, public universities are participants in the [Oregon Transparency website](#) that includes links to institutional financial reports and statewide program reports. In 2019 the Legislature adopted a budget note to House Bill 5024 requiring the public universities to collectively report to the Joint Committee on Ways and Means on cost management measures implemented during the 2019–20 academic year including administrative and program reductions, use of reserve balances, positions eliminated or left vacant for more than six months, and any new positions established. This was an exhaustive report that took more than 350 hours of work from campus budget officers, vice presidents for finance and administration, and Oregon Council of Presidents staff to complete. The initial report, including recommendation by the Legislative Fiscal Office (LFO) and the Department of Administrative Services (DAS) to accept it, can be found [here](#). An updated report for the 2020–21 academic year that was accepted by the Emergency Board in December 2020 can be found [here](#).

Higher Education Coordinating Commission: The HECC conducts extensive and frequent review of public university finances. Its Finance and Achievement Subcommittee focused almost exclusively on public university finance and funding from April 2017 through June 2021 when they started reviewing community college funding. The HECC is also statutorily charged with several responsibilities to ensure public universities' accountability. These include approval of institutional mission statements (ORS 352.089), approval of new academic programs (ORS 352.089), review of tuition and mandatory fee increases for resident undergraduate students that are 5 percent more than the previous academic year (352.102), and annual reviews of data on specified employee groups (350.360).

In addition, the HECC completes institutional evaluations; each public university must be evaluated once every two years. This accountability mechanism was established when university governing

boards were initially authorized. Under ORS 352.061, each evaluation must include: a report on the university's achievement of outcomes; measures of progress, goals and targets; an assessment of the university's progress toward achieving the mission of education beyond high school as described in ORS 350.014; and an assessment as to how well the establishment of a governing board comports with the findings set forth in ORS 352.025. The evaluations draw from a combination of accreditation reports, self-assessments conducted based upon criteria developed by the HECC, and state and federal data. The HECC assesses areas of key commission interest in support of state objectives such as student success as measured by degree completion; access and affordability as measured by equity across socioeconomic, racial/ethnic, and regional (urban/rural) groups; academic quality and research; financial sustainability; and continued collaboration across universities. Completed institutional evaluations can be found [here](#) and are submitted to the legislature annually.

The financial metrics section of institutional evaluations is now completed annually for all public universities as a standalone Financial Condition Analysis detailing the financial conditions of each public university. These reports contain enhanced contextual information on an institution's financial condition along with financial ratios. Developed by the HECC's Office of Postsecondary Finance and Capital, the financial conditions report draws on calculations for the previous five fiscal years to address two key questions that are similar to those reviewed by accreditors: Is the institution financially capable of successfully carrying out its current programs? Is the institution able to carry out its intended programs well into the future? The most recent Financial Condition Analysis can be found [here](#).

In addition to completing the annual Financial Conditions Analysis, the HECC also annually compiles a [Public University General Fund Update](#) with information about fall enrollments and projected impacts on E&G fund balances.

Another key component of accountability for public universities is the Student Success and Completion Model (SSCM) through which HECC distributes the PUSF. Beginning in 2013, the state restructured operational funding for public universities and transitioned over time to the SSCM which is the **only outcomes-based funding formula for public education entities in Oregon**. The SSCM allocates the universities' operational funding more on the basis of outcomes (degree and certificate completions) than on enrollment. The model also provides completion incentives tied to historically underrepresented students—low income students, underrepresented minorities, rural students, and veterans—as well for statewide priority degree areas including STEM, healthcare, and bilingual teacher education.

The HECC also has a role in capital construction at public universities. In 2019, the HECC commissioned a comprehensive Strategic Capital Development Plan (SCDP). The SCDP was conducted to holistically review the capital needs of the state by assessing how public university infrastructure aligned with the HECC's visionary, strategic framework for advancing postsecondary goals. As outlined in the solicitation documents, the state's higher education capital needs are expected to be driven by "demographic, economic, other environmental and industry factors" and the SCDP helps guide the HECC's evaluation of university-submitted capital project proposals. There is also the expressed expectation that the SCDP will promote cost-effective means to maintain and increase the utilization and productivity of existing capital assets. Additionally, under ORS 350.095, the HECC certifies revenue sufficiency for Article XI-F bonds and public universities also annually report to the legislature through the HECC on the use of apprentices and minority and women-owned businesses for qualified capital construction contracts (see ORS 350.379).

University Governing Boards: The legislature has established that Oregon benefits from public university governing boards that provide transparency and public accountability (ORS 352.025). Governing boards manage the affairs of each university by exercising powers, rights, and duties assigned by law and have fiduciary responsibility for their institution. Board members are governor-appointed and senate-confirmed. Since their inception, university governing boards have undertaken comprehensive and inclusive strategic planning processes to establish frameworks for decision making that prioritize stewardship of critical resources provided by the state and students. University governing boards regularly analyze in-depth financial reports containing actual and projected revenues, expenses, debt levels, and trends. All of those reports are publicly available on each university's website. Governing boards also review annual financial audits and cultural competency assessments pursuant to ORS 350.375.

Public University Support Fund Budget Scenarios

Oregon's public universities receive state support for operations through three primary funding channels:

- **Public University Support Fund**

The PUSF is the state's General Fund contribution to the operation of the educational programs of the seven universities. On average, 65 percent of universities' E&G funding, is derived from student tuition and fees. E&G funds pay for the instructors and support services to students, faculty members, and campus public service programs as well as administrative support services.

- **State Programs and Statewide Public Service Programs**

Funding for centers, institutes, and programs addressing statewide economic development, natural resources, and other needs are included in the State Programs and Statewide Public Service (SWPS) programs. These appropriations are discussed in more detail later in the document.

A Note on Retirement Costs

The universities were instructed to use the 2021 PERS advisory rates when calculating costs. Based on market performance in the last quarter of 2021 and changes adopted due to the passage of Senate Bill 1049 (2019), we anticipate that the final rates that will be approved by the PERS board in the fall of 2022 will be less than the advisory rates. When rates are revised, the universities will work with the HECC and DAS to determine if the University Base Funding request should be revised downward by a commensurate amount. Additionally, the universities believe this review should include an assessment of current inflationary factors. With inflation rising to levels not seen in 40 years, and significant volatility caused by ongoing international conflicts it would be wise for the universities and the HECC to evaluate if the inflation estimates included in the request remain accurate in the fall of 2022.

Providing a Secure Retirement

The work of dedicated employees allows universities to effectively operate and comprehensively support students.

Universities must build into their budgets the costs for state-mandated benefits to employees such as retirement and healthcare coverage as well as collective bargaining. Once executed, bargaining agreements covering represented employees dictate and determine employment conditions and benefits. It is important that the state share these mandated costs with institutions.

As part of its budget instructions, the HECC asks the universities to model several funding levels of PUSF using the SSCM. Note that underlying data in the SSCM—enrollment, outcomes (degree completions), programmatic mix—all remain constant using FY22 data in these models; only the total PUSF amount changes. In reality, these data points are interdependent.

TABLE 5

2021-23 PUSF Appropriation and Annual Allocation								
	EOU	OIT	OSU	PSU	SOU	UO	WOU	Total
FY22	\$ 21,506,844	\$ 30,282,842	\$ 140,641,112	\$ 110,071,591	\$ 25,720,298	\$ 82,307,597	\$ 30,469,719	\$ 441,000,002
FY23 Est Allocation	\$ 21,985,302	\$ 29,170,730	\$ 147,204,488	\$ 115,843,115	\$ 26,688,804	\$ 86,376,679	\$ 31,730,880	\$ 458,999,998
2021-23 Total	\$ 43,492,146	\$ 59,453,572	\$ 287,845,600	\$ 225,914,706	\$ 52,409,102	\$ 168,684,276	\$ 62,200,599	\$ 900,000,000

It is important to note that the SSCM is an outcomes driven model, therefore institutional allocations do not necessarily track with increases or decreases in state funding.

For context, the 2021–23 PUSF appropriation and annual allocation is shown in Table 5 (above). The preliminary FY22 allocation has been made and will be trued-up in the fall when enrollment data is updated. FY22 has been allocated; FY23 allocations are estimated.

Each of the agency-requested scenarios are included in Appendix B (page 41). For the purposes of articulating impacts on students, faculty, and staff the universities are highlighting three scenarios in the body of this document.

1. No change in total PUSF Funding,
2. Status Quo or University Base Funding, and
3. The Public Universities’ 2023–25 Budget Request.

Scenario B.1—No Change in Total Funding from 2021–23 (Flat Funding)

TABLE 6

HECC Scenario B.1: No Change in Total Funding from 2021-23 (Flat Funding)								
	EOU	OIT	OSU	PSU	SOU	UO	WOU	Total
FY24	\$ 21,507,563	\$ 28,310,747	\$ 140,974,516	\$ 110,825,595	\$ 25,959,998	\$ 82,711,238	\$ 30,710,343	\$ 441,000,000
FY25	\$ 21,985,302	\$ 29,170,730	\$ 147,204,489	\$ 115,843,116	\$ 26,688,804	\$ 86,376,679	\$ 31,730,880	\$ 459,000,000
2023-25 Total	\$ 43,492,865	\$ 57,481,477	\$ 288,179,005	\$ 226,668,711	\$ 52,648,802	\$ 169,087,917	\$ 62,441,223	\$ 900,000,000
<i>Change from 2021-23 PUSF</i>	\$ 719 0.0%	\$ (1,972,095) -3.3%	\$ 333,405 0.1%	\$ 754,005 0.3%	\$ 239,700 0.5%	\$ 403,641 0.2%	\$ 240,624 0.4%	\$ - 0.0%
<i>Change from FY23 to FY24</i>	\$ (477,739) -2.2%	\$ (859,983) -2.9%	\$ (6,229,972) -4.2%	\$ (5,017,520) -4.3%	\$ (728,806) -2.7%	\$ (3,665,441) -4.2%	\$ (1,020,537) -3.2%	\$ (17,999,998) -3.9%
<i>Variance with A.1. Status Quo/UBF</i>	\$ (2,220,287) -4.9%	\$ (3,837,468) -6.3%	\$ (26,818,031) -8.5%	\$ (21,557,277) -8.7%	\$ (3,282,235) -5.9%	\$ (15,774,993) -8.5%	\$ (4,509,709) -6.7%	\$ (78,000,000) -8.0%



The SSCM model was updated for the 2021–23 biennium. To avoid any single university experiencing a significant fluctuation in funding during the transition, a one-year "hold harmless" feature was incorporated into the model. That feature is eliminated in future biennia. Thus, even though the total in this scenario remains unchanged from 2021–23, the individual allocations vary within the current biennium.

Flat funding represents a reduction budget on two fronts. First, it does not cover unavoidable cost increases as calculated in the status quo/University Base Funding scenario. Second, because biennial allocations are 49 percent in year one of a biennium and 51 percent in year two, the change in allocation from FY23 (year two of 2021–23 at 51 percent) to FY24 (year one of 2023–25 at 49 percent), results in decreased resources for that fiscal year.

Types of Measures Necessary to Remain Financially Viable

Whenever state resources are reduced, the universities have a finite set of available options. Each university would deploy the mix of options best suited to its own financial circumstances.

Reduce Expenses

Potential options to address reduced funding include personnel actions such as pay cuts, furloughs, and layoffs (only to the extent not precluded by collective bargaining agreements); hiring freezes; and holding unfilled positions open. Programs and services can be curtailed or eliminated and select expenditures can be managed, such as limiting travel.

Increase Other Revenues

Universities' primary operating revenues consist of state appropriations, tuition, indirect recoveries and interest earnings. Net tuition revenue represents around 65 percent of universities' operating revenues. In recent years, significant increase to tuition has become less of an option. While graduate programs and nonresident tuition rates are competitive on a national scale, families are increasingly unable and unwilling to pay higher costs.

Indirect cost recoveries are reimbursements of facility and administrative costs incurred on research grants based on rates negotiated with the federal government.

They are driven by the level of research productivity and not a predictable resource for filling other revenue gaps. Interest earnings are market driven. When revenues are decreasing, there is less cash to invest and it cannot be counted on as a resource to replace reduced state appropriations.

Use Reserves

While universities follow best practices and maintain limited reserves, use of reserves to fill funding gaps is a one-time option that does not permanently solve budget issues. Often, however, it takes time to implement large budget cuts and, in those circumstances, universities are forced to draw down reserves until permanent reductions can be fully implemented.

Scenario A.1—Status Quo or University Base Funding

TABLE 7

HECC Scenario A.1: Status Quo (University Base Funding)									
	EOU	OIT	OSU	PSU	SOU	UO	WOU	Total	
FY24	\$ 22,597,005	\$ 30,192,214	\$ 154,113,567	\$ 121,386,808	\$ 27,569,534	\$ 90,439,899	\$ 32,920,973	\$ 479,220,000	
FY25	\$ 23,116,147	\$ 31,126,731	\$ 160,883,469	\$ 126,839,180	\$ 28,361,503	\$ 94,423,011	\$ 34,029,959	\$ 498,780,000	
2023-25 Total	\$ 45,713,152	\$ 61,318,945	\$ 314,997,036	\$ 248,225,988	\$ 55,931,037	\$ 184,862,910	\$ 66,950,932	\$ 978,000,000	
<i>Change from 2021-23 PUSF</i>	<i>\$ 2,221,006</i> <i>5.1%</i>	<i>\$ 1,865,373</i> <i>3.1%</i>	<i>\$ 27,151,436</i> <i>9.4%</i>	<i>\$ 22,311,282</i> <i>9.9%</i>	<i>\$ 3,521,935</i> <i>6.7%</i>	<i>\$ 16,178,634</i> <i>9.6%</i>	<i>\$ 4,750,333</i> <i>7.6%</i>	<i>\$ 78,000,000</i> <i>8.67%</i>	

TABLE 8

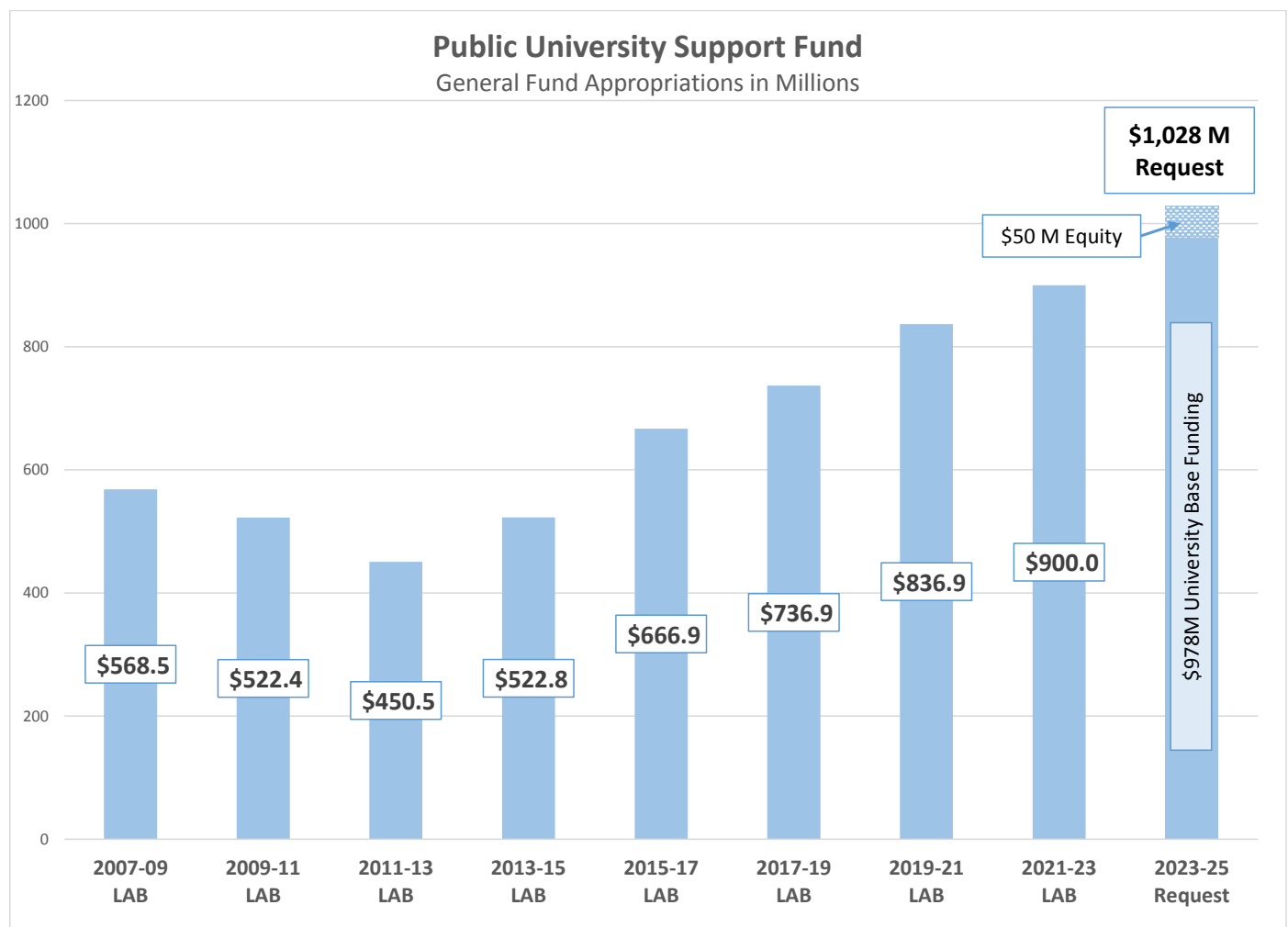
Calculation of University Base Funding								
Education & General Expenses Public Universities Compiled	2021-23		2023-25					
	FY22 & FY23	Expense Share of Total	FY24 & FY25	Expense Share of Total	\$ Increase over 2021-23	Increase Share of Total	% Increase over 2021-23	Weighted Increase
Expenses								
Salary & Pay	1,858,040,172	50.1%	2,001,049,451	49.6%	143,009,280	44.4%	7.7%	3.9%
Health Benefits	390,338,196	10.5%	420,801,879	10.4%	30,463,683	9.5%	7.8%	0.8%
Retirement Benefits	420,179,373	11.3%	493,139,306	12.2%	72,959,933	22.7%	17.4%	2.0%
Other Benefits	249,506,051	6.7%	267,849,431	6.6%	18,343,380	5.7%	7.4%	0.5%
Supplies & Services	791,991,006	21.3%	849,012,442	21.1%	57,021,436	17.7%	7.2%	1.5%
Total expenses	3,710,054,797	100.0%	4,031,852,509	100.0%	321,797,712	100.0%	8.7%	8.67%
PUSF	900,000,000		978,000,000		78,000,000		8.67%	
Fund Split (State share)	24.3%		24.3%					

The University Base Funding cost estimates the state resources needed to continue the current level of programs and learning outcomes, while assuming current enrollments, tuition, and levels of staffing. Expected cost increases factor in collective bargaining agreements, likely rate increases for health, retirement, and other employee benefits, and general inflation on supplies and services. Each university individually calculates its base funding cost. After comparative analysis to ensure consistency, the sum total constitutes the University Base Funding request. Note, however, that the SSCM is an outcomes driven model and institutional allocations from the SSCM are not a pro rata share of increased state funding, nor do they match any individual institution's projected costs.

The calculation also assumes continuation of the current “fund split”—the portion of E&G expenses covered by the state in contrast to the portion covered by the university through student tuition. As has been the past practice in recent biennia, the University Base Funding request includes a state investment that would cover retirement cost increases only on the portion of the budget that is funded by the state.

The following figure summarizes the universities funding request in comparison to previous appropriations. The subsequent charts describe the expected outcomes and impacts on students at three funding levels.

FIGURE 4



University Budget Request—\$1B 28M in PUSF, \$20M in Funding for Strong Start Program, and \$50M Increase in OOG Funding

PUSF	Increase Over 2021-23	Access and Affordability	Student Outcomes	Progress to Degree	Student Services	Other Measures
\$1.02 Billion	+\$128 Million	<p>Tuition increases at most campuses below 5% for both years of the biennium. Many campuses below 3%.</p> <p>Preserves recent investments in financial aid for rural, first-generation, and historically under-represented students.</p>	<p>Campuses will have the ability to invest in addressing academic impacts of the COVID-19 pandemic on new and returning students.</p> <p>Gains made over the last two biennia will be sustained.</p> <p>Targeted investments in work to address the needs of students identified in HB 2590 (2021). If funding is sustained, these programs and investments can help close the persistent gaps in retention and completion between students traditionally represented on university campuses and those historically underserved.</p>	<p>Expanded services to students result in increased degree attainment.</p> <p>Resources available to target financial aid awards toward students at risk of pausing out without a degree.</p>	<p>Maintains recent investments in student services.</p> <p>Campuses equipped to expand services for populations of students identified in HB 2590 (2021).</p>	<p>Campuses will be better equipped to reflect the hard work of dedicated faculty and staff in contract negotiations.</p> <p>State assumes responsibility for benefits-driven cost increases, ensuring they do not fall on the backs of students and their families.</p>

\$978M, University Base Funding Request (8.67% Increase)

PUSF	Increase Over 2021-23	Access and Affordability	Student Outcomes	Progress to Degree	Student Services	Other Measures
\$978 Million	+\$78 Million	<p>Low to moderate tuition increases at most universities for both years of the biennium.</p> <p>Preserves some recent investments in financial aid for rural, first-generation, and under-represented students.</p>	<p>Campuses will have limited ability to invest in addressing academic impacts of the COVID-19 pandemic on new and returning students.</p> <p>Gains made over the last two biennia will be sustained.</p> <p>Continued pressure on affordability and increased student debt.</p>	Continued status quo with regard to degree attainment.	<p>Maintains most recent investments in student services.</p> <p>Recent investments in key programs assisting veterans, BIPOC, LGBTQIA, and low-income students may be maintained.</p>	<p>Campuses will be better equipped to reflect the hard work of dedicated faculty and staff in contract negotiations.</p> <p>State assuming responsibility for benefits-driven cost increases ensure they do not fall on the backs of students and families.</p> <p>Minimal progress in closing systemic achievement/ opportunity gaps.</p>

\$900M (0% Increase in PUSF)

PUSF	Increase Over 2021-23	Access and Affordability	Student Outcomes	Progress to Degree	Student Services	Other Measures
\$900 Million	0% increase	<p>Significant tuition increases on most campuses.</p> <p>Fewer Oregonians will seek a degree.</p> <p>Student debt will accelerate at higher rates.</p>	<p>Campuses will be unable to invest in addressing academic impacts of the COVID-19 pandemic on new and returning students.</p> <p>Increased costs will perpetuate a cycle where students are forced to choose between academic progress and addressing basic needs (food, housing, utilities, etc.)</p> <p>Campuses will struggle to maintain student support services, precisely at the moment when needs are growing.</p> <p>Potential cuts to academic programs will limit the ability for some students to graduate on time.</p>	<p>Increased costs will result in more students pausing out (taking on debt without a degree).</p> <p>Longer duration to degree attainment will result in increased costs to students.</p>	<p>Campuses will struggle to protect student services, academic advising, and financial aid advisors from budget cuts.</p> <p>Campuses will struggle to protect funding for resources targeted toward closing opportunity gaps.</p>	<p>Campuses will struggle to reflect the hard work of dedicated faculty and staff in contract negotiations.</p> <p>The majority of payroll and benefits-driven cost increases borne by students and their families.</p> <p>Achievement/ opportunity gaps likely to persist and widen.</p>

Equity Achievement Investments

As Oregon's public universities navigate the endemic phase of COVID-19, we are focused on providing services and opportunities to traditionally underserved students in an effort to close persistent equity gaps in enrollment, retention, and completion. As Oregon's demographics continue to change, the emerging majority will be those who have been traditionally underrepresented and underserved on college campuses. If we expect these students to succeed and enter the workforce, we must rethink how we support these students from the moment they consider options after high school to the time they graduate and join the workforce.

In addition to our requests for funding in the PUSF and State Programs, and central to our 2023–25 budget request, the universities have developed content for a policy option package that will support the goals of the HECC's Strategic Roadmap by sustaining and growing existing successful student service programs for traditionally underrepresented students.

Specifically, as part of the public universities' budget request, we are proposing a \$100 million investment in underrepresented student success. Components of this investment would include:

1. \$50 million increase in funding for the OOG,
2. \$50 million in Equity Achievement Investments to university campuses.

In recent months public universities have convened student success and diversity, equity, and inclusion experts on our campuses to discuss best practices to support historically underserved students. This group quickly focused on three core areas:

1. Helping students get enrolled and get started on their path toward a degree,
2. Making sure that students have what they need to stay and persist toward getting their degree, and
3. Providing students support and pathways to careers following successful completion.

Using this framework, each campus has articulated plans for how they would deploy new state funding to assist students in these areas. For some this involves scaling existing programs, while others intend to start new programs modeled after best practices on other campuses nationwide. Examples of how these investments could improve enrollment, retention and completion for traditionally underserved students include the following:

Helping students get enrolled and get started on their path toward a degree

Oregon Institute of Technology (OIT) The OIT Klamath Falls campus has recently joined Oregon MESA. This program serves more than 600 middle and high school students who are historically underrepresented in STEM fields. The foundation of Oregon MESA is to provide a school-based invention education program—the only adaptable, prototype-driven math, engineering, and science program for traditionally underrepresented students that takes an ecosystem approach to education.

Eastern Oregon University (EOU) Connecting with students throughout the K-12 system is critical in helping them understand and actively participate in plans for postsecondary opportunities. This program employs the following strategies to that end:

- Diverse student outreach coordinators in rural and frontier school districts,
- Summer bridge programs to assist students in preparation for college,
- Dual-credit programs for students to gain credit for classes they are already taking in high school and ensure those credits expedite degree completion, and
- Early College Initiatives resources to develop collaborations with schools.

Southern Oregon University (SOU) Pre-College Youth Programs offer enriching and dynamic educational programs to K-12 students in southern Oregon. Programs include summer camps, enrichment classes and workshops, regional academic competitions, and early college credit programs for high school students. The program has a strong focus on underrepresented populations and to that end, prioritizes high-quality affordable programming, including those specifically designed for Latino/a/x and Native learners. While the Alameda/Oberlin fires and COVID-19 impacted attendance, the program continues to draw participants, ending the 2020–21 academic year with a positive fund balance for the program and robust engagement following program administrator outreach to effected youth and families. On average, program participants matriculate at the following rates: Latino/a/x programs—Academic Latina 22 percent, Pirates to Raiders 26 percent, Early College Credit 30 percent.

Oregon State University (OSU) Families and communities are best served when they have clear information and preparation regarding the alternative pathways, benefits, and costs of pursuing university education. Access OSU is a new initiative led by OSU's Division of Extension and Engagement and the Division of Student Affairs to connect with community partners and provide prospective students and their families with knowledge and resources to prepare for and gain access to college. This program endeavors to work with communities across the state to engage both rural and urban families. Intended outcomes include:

- Oregon families believe in what an education at OSU can do to support their prosperity,
- Oregon families understand how to navigate applying to and funding college,
- Students experience a supportive community and resources at OSU,
- Underrepresented students have a positive experience at OSU,
- Families and communities develop trust in OSU,
- Graduates return to their communities, and
- Oregon communities and families thrive.

OSU is investing resources into this effort and a state investment would allow for a broader and more rapid impact.

Making Sure Students Have What They Need to Stay and Persist Toward Getting Their Degree

Portland State University (PSU) Multicultural Retention Services (MRS) The mission of MRS is to ensure the academic success, retention, and graduation of first-generation low-income students from historically underserved backgrounds. MRS strives to empower and inspire students by providing academic support, advising, mentorship, advocacy, and leadership development. MRS services and programming build a sense of community and belonging essential to successfully navigate PSU. MRS offers four first-year retention programs to incoming PSU students. Each program is uniquely designed to connect students with a diverse community at PSU and focuses on the college experience of a specific cultural community.

PSU—Cultural Resource Centers The Cultural Resource Centers at PSU include the Multicultural Student Center; the Pan-African Commons; the Pacific Islander, Asian & Asian American Student Center; La Casa Latina Student Center, the Native American Student and Community Center; the Middle Eastern, North Africa, South Asia Student Center; and a soon-to-come Dreamer Resource Center.

Western Oregon University (WOU) WOU has several programs aimed at improving the first-to-second year retention and graduation rates of BIPOC students so that underrepresented students have the same or higher retention and graduation rates as WOU's highest achieving ethnic group (Latinx students). WOU would use additional state funding to expand current programs, including:

- Multicultural Student Services and Programs could double the number of students served,
- Teacher Preparation Student Support Program would serve 200 more students,
- Providing additional funds to support reengagement and completion grants for up to 500 students annually, focusing on students from underserved communities,
- Expanding the support for Executive Director of Diversity, Equity, and Inclusion, and
- Enhancing faculty and staff diversity training by serving the entire campus community.

Providing Students Support and Pathways to Careers Following Successful Completion

University of Oregon (UO) DucksRISE Launching in Spring 2022, DucksRISE (Research, Internship, and Student Engagement) is a grant-funded program (with one additional year of support from institutional funds) focused on equitable career outcomes for underserved students, centering on Pell-eligible and underrepresented minority populations. Through an integrated approach to continued academic preparation and career readiness embedded into the core of the student experience both in and out of the classroom at an R1 research university, the cohorts will participate in a course, associated cocurricular workshops, and professional development opportunities intended to build community and foster a sense of belonging while developing career skills and National Association of Colleges and Employers competencies. The core of the DucksRISE program will culminate with placement in a three-month career readiness mentorship experience (e.g., internships, externships, research/creative work experiences) to expand professional and industry networks, bridge the connection between undergraduate research and career exploration, and gain the tools to be competitive in postgraduation opportunities. The program is supported by a one-year Strada Education Network Beyond Completion Challenge Grant. Permanent and increased funding would rapidly expand students' postgraduation career outcomes.



Engagement with Racial Justice Council

As the universities developed these investment plans, staff were able to meet with representatives of the Education Recovery Committee (ERC), a subcommittee of the Racial Justice Council (RJC), to share this framework and solicit input and feedback on how our institutions could best serve students. The framework of inspiring a college-going culture through implementing strategic outreach and support, providing structures to ensure students persist, and focusing activity on ensuring postgraduation job and workforce opportunities resonated with participants and aligned with the experiences and challenges they and their organizations have had with higher education institutions in Oregon. The public universities hope to continue this dialogue and partner closely with the RJC and ERC on the implementation of these investment proposals.

State Programs and Statewide Public Service Programs

The universities' joint priority for State Programs and SWPS is to receive a full base funding level increase of 8.67 percent to avoid erosion of program effectiveness and delivery over time. In 2021–23 neither appropriation received the universities' base funding level. The 2023–25 requests include a make-up provision for both appropriation categories. These catch-up provisions bring the requested 2023–25 increase to about 10 percent for the State Programs and 10.1 percent for the SWPS.

State Programs

In 2013–15, the state divided E&G funding into the PUSF and an appropriation category of "State Programs." These consist of line-item appropriations to programs that address economic development, natural resource, and other issues rather than provide support for students and institutions.

State Programs facilitate the integration of the universities' multiple missions of instruction, research, and service. The responsiveness of the public universities to support state needs is highlighted in two programs that receive State Programs funding.

Domestic Violence Legal Clinic When Oregon and other states imposed Stay Home orders in March 2020, domestic and intimate partner violence rose as survivors and perpetrators were confined together and did not attend employment, school, or other outside activities on a regular basis. This spike in incidents led to increased demand for services from nonprofits in this space. The Domestic Violence Legal Clinic housed within the UO School of Law was equipped to address some of this increased need. The clinic offers legal services to low-income victims or survivors of sexual assault, dating/domestic violence, and stalking. In addition to serving survivors, the clinic also provides law students an opportunity to learn how to effectively represent clients in civil and criminal legal matters, including protective order proceedings, family law matters, and employment and housing issues. Law students are supervised by law faculty who are licensed attorneys and subject-matter experts, allowing them to represent clients while learning the tenets of law applicable to the area of practice.

Wildfire Risk Mapping Universities often receive targeted funding (one-time or over several biennia) to address specific and sometimes time-sensitive concerns of the state. Wildfire risk mapping is an example that developed after the state's historic wildfire devastation in 2020. In Senate Bill 762 (2021), the legislature funded OSU's participation in a statewide effort to promote wildfire risk reduction, response, and recovery. Several units—the College of Forestry, the Institute for Natural Resources (INR), and Extension Service (ES)—were funded to develop, maintain, and host the wildfire risk map, as well to collaborate with the Oregon Department of Forestry on the development of the 20-year strategic plan for landscape restoration. The bill appropriated the following funds for 2021–23 and the LFO fiscal impact statement noted the anticipated appropriations for 2023–25. However, the university's fiscal impact information inadvertently showed only an annual amount for the College of Forestry. The public universities' CFR requests 2023–25 amounts as specified by LFO for INR and ES, but requests a corrected biennial amount for the College of Forestry. Also note that the amounts requested for the College of Forestry and ES are intended to be ongoing elements within the public universities' appropriations.

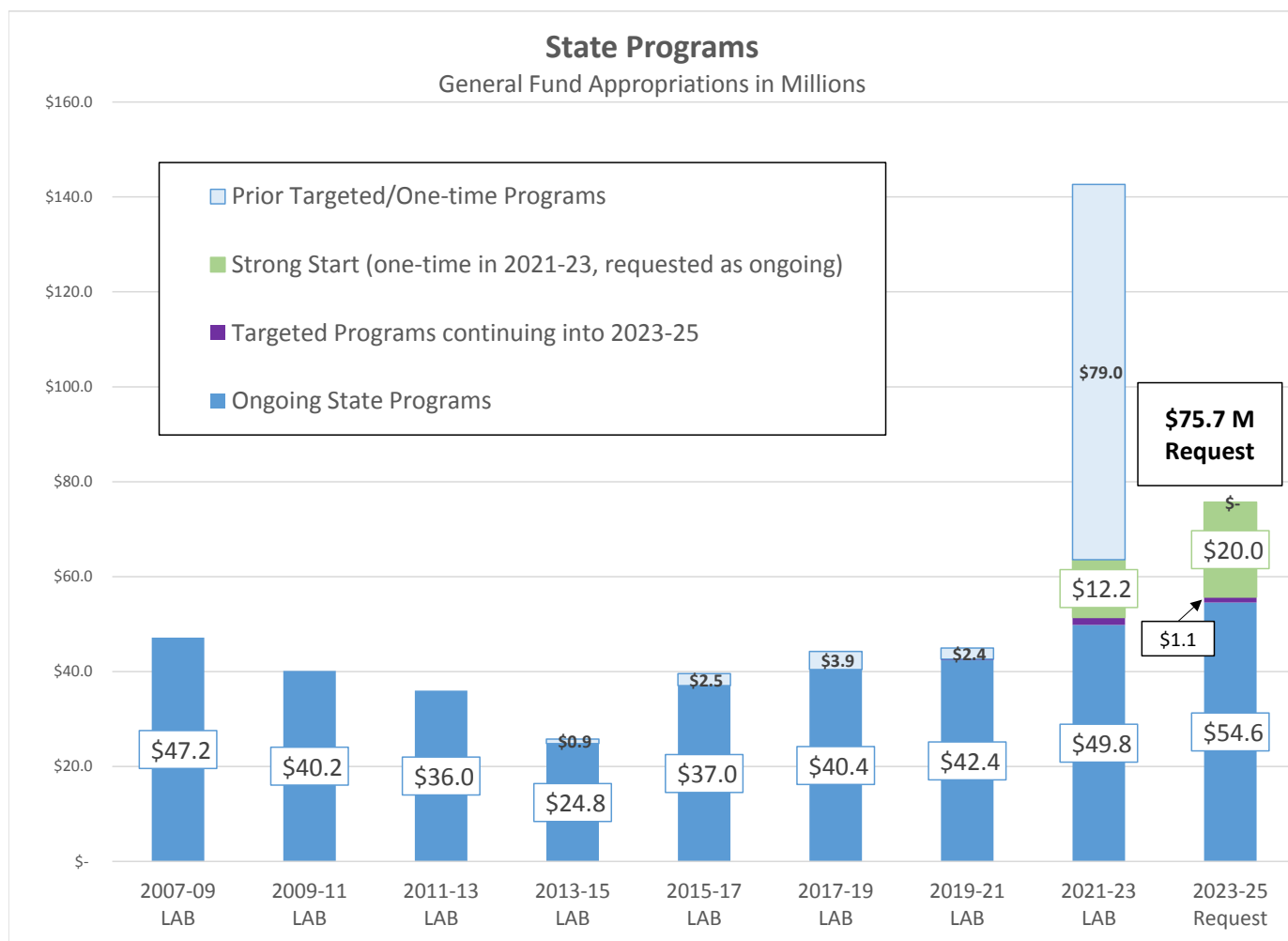
TABLE 9

Wildfire Mapping and Collaboration with ODF on 20-year Strategic Plan for Landscape Restoration	SB 762 (2021) LFO FISCAL		Corrected Request for 2023-25	Ongoing beyond 2023-25
	2021-23	2023-25		
College of Forestry [SB 762 section 7]				
Map development	\$ 770,000.00			
Ongoing costs to update data and scenario planning	\$ 180,000.00	\$ 180,000.00	\$ 360,000.00	\$ 360,000.00
	\$ 950,000.00	\$ 180,000.00	\$ 360,000.00	\$ 360,000.00
Institute of Natural Resources [SB 762 sections 7 & 12c]				
Hosting and updating the Oregon Wildfire Risk Explorer and associated tools	\$ 165,000.00	\$ 165,000.00	\$ 165,000.00	\$ 20,000.00
Extension Service [SB 762 sections 18 (3)(a) and 36(12)]				
Collaboration on strategic landscapes; representation on the Wildfire Programs Advisory Council	\$ 23,040.00	\$ 23,040.00	\$ 23,040.00	\$ 23,040.00
Total	\$ 1,138,040.00	\$ 368,040.00	\$ 548,040.00	\$ 383,040.00
One-time	\$ 770,000.00	\$ -	\$ -	\$ -
Recurring	\$ 368,040.00	\$ 368,040.00	\$ 548,040.00	\$ 403,040.00
	\$ 1,138,040.00	\$ 368,040.00	\$ 548,040.00	\$ 403,040.00

Proposing a New State Program—Making Permanent Investments in Strong Start/Summer Bridge Programs:

As previously described in this document, the public universities are requesting \$20 million in continuing support for Strong Start/summer bridge programs. While these programs were quickly developed in the summer of 2021 to assist entering students who had been negatively impacted by interrupted/remote learning during the pandemic, we expect that the learning lost during the pandemic will impact entering classes for years to come.

FIGURE 5



Statewide Public Service Programs

The three programs that constitute the SWPS—the Agricultural Experiment Station (AES), the Extension Service (ES), and the Forest Research Laboratory (FRL)—are longstanding services administered through OSU and benefitting Oregonians in all 36 counties and nine federally recognized tribes of Oregon. The SWPS activities are a primary example of how Oregon’s land-grant university intentionally integrates instruction, research, and service missions to enhance lives and livelihoods in all Oregon communities. As noted with the PUSF and State Programs, it is vital to the integrity of these services that state support reflects the base cost increases.

When managed by attrition, budget shortfalls and reductions leave little opportunity for strategic planning and no opportunity for maintaining investments in critical, developing areas of need. Instead, even in times of deficit, these programs are expected by the state and stakeholders to set priorities for investment and address new and emerging needs for Oregon.

Recent biennia illustrate the volatility in state funding. The SWPS absorbed a 12.5 percent reduction in actual funding over the 2011 and 2013 biennia that forced a fundamental assessment and reprioritization of programs based on input from stakeholders. Thanks to strong stakeholder advocacy in 2019–21, the SWPS received a 15.7 percent increase.

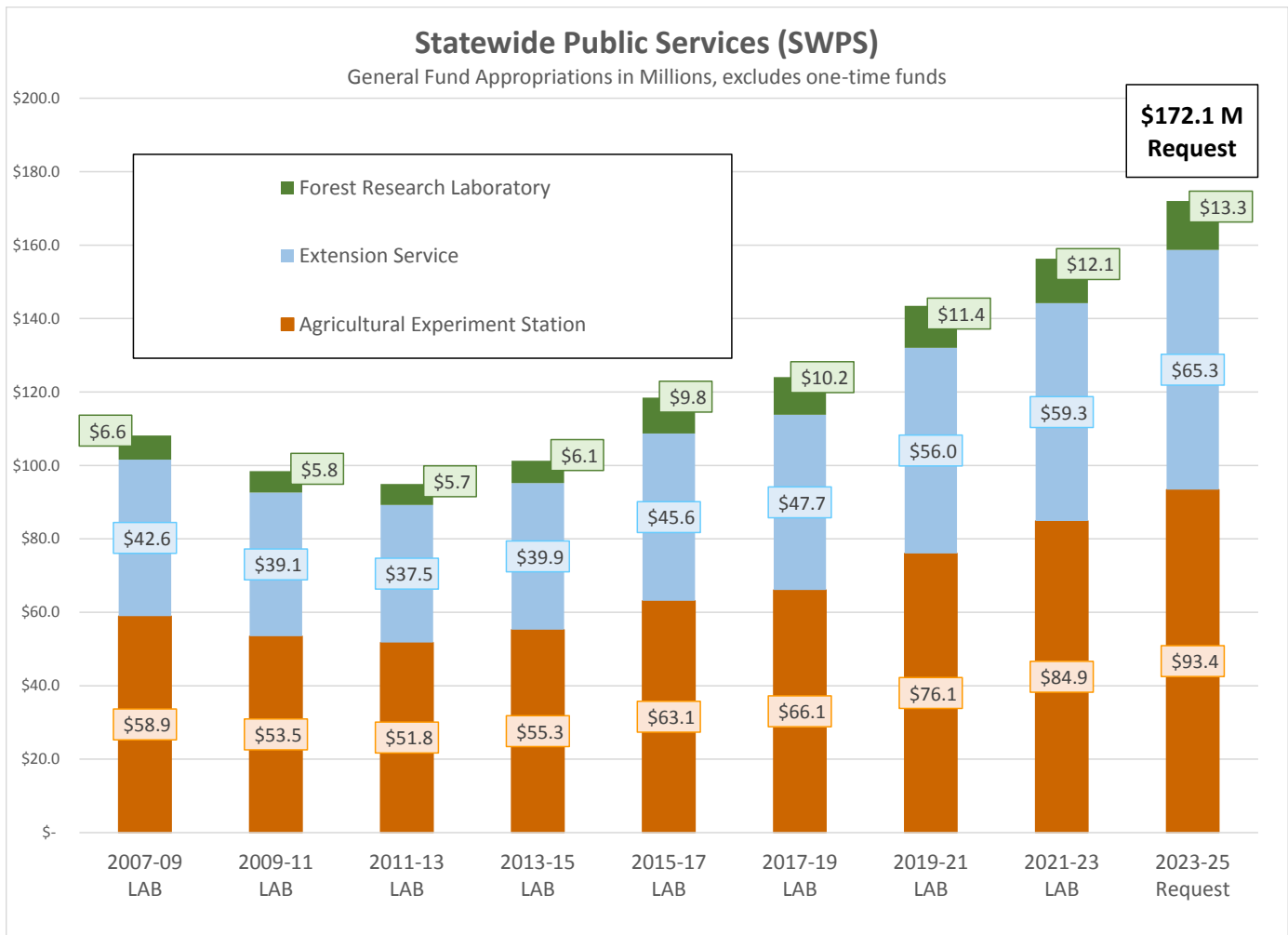
Unfortunately, in the 2021–23 biennium, the programs did not receive their full request to cover adjusted operating costs. This created a \$2.2 million shortfall across the three program areas. To cover this gap, the program areas will again work with stakeholders to prioritize services and not fill existing or upcoming vacancies.

The request for 2023–25 includes the \$2.2 million deficit and reflects what is needed to cover base cost increases to maintain programs and be able to respond to the needs of Oregonians across the state.

2023–25 Statewide Public Service Programs Request (excluding Outdoor School funded by lottery funds):

Agricultural Experiment Station	\$ 92,414,733
Extension Service	\$ 65,297,908
Forest Research Laboratory	<u>\$ 13,320,249</u>
	\$172,032,890

FIGURE 6



Sports Lottery Scholarships

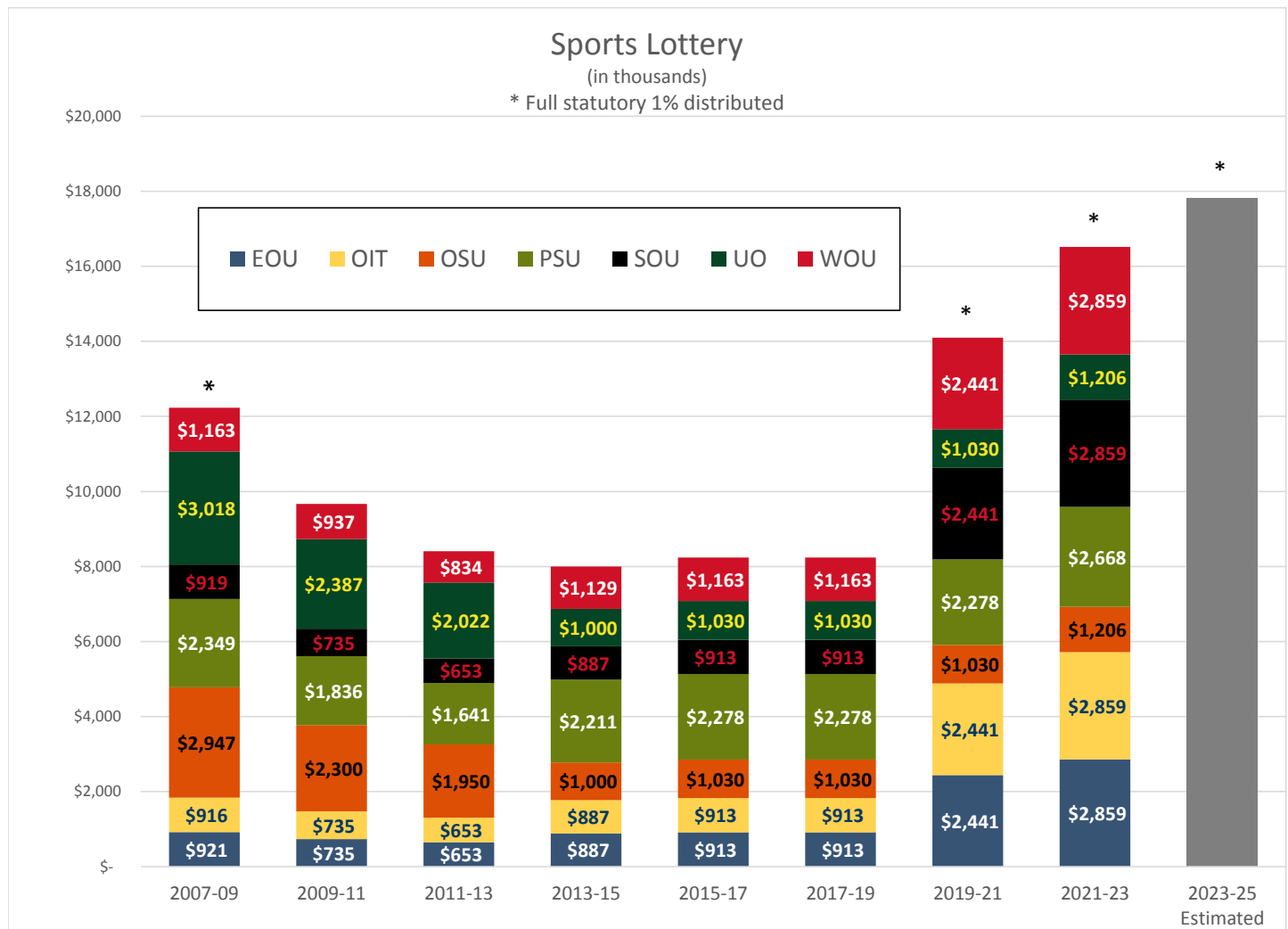
In 2005 the Oregon legislature passed House Bill 3466, removing the Oregon State Lottery Commission's authority to operate "Sports Action" games. Prior to 2005, the proceeds of Sports Action games were used by the State Board of Higher Education to fund athletic programs at state institutions of higher education. The legislation established a new funding source for athletics programs by replacing the funds with 1 percent of the State Lottery transferred to the Economic Development Fund.

The legislation was necessary because, at the time, the National Collegiate Athletic Association (NCAA) did not allow states that sponsored gambling on athletic events to host NCAA championship tournaments. The elimination of Sports Action games in Oregon made the state eligible to bid on opportunities to host NCAA tournaments. Since the passage of the bill, a wide range of tournaments have been held in Oregon, driving millions of dollars into the economy. After providing the full 1 percent funding in the first year, the legislature pulled back from its commitment in subsequent biennia before returning to full funding in 2019-21 and in subsequent biennia.

Across Oregon, Sports Lottery funding allows students who might otherwise not have had access to college to attend universities. Funding intercollegiate athletics and graduate academic scholarships through Sports Lottery revenue has a proven positive effect on enrollment, retention, and diversity. Sports Lottery funding is a primary way that many campuses are able to meet Title IX requirements to equitably fund women’s athletics. Taking part in intercollegiate athletics while pursuing a degree generally has a positive multiplier effect on students and promotes the skills that universities are teaching in the classroom: teamwork, problem-solving, and informed decision-making.

Sports Lottery funding increases the overall goal of student diversity at every level: gender, geographic, ethnic, and economic background. The student-athletes who benefit from these investments strongly support a continued and sustained investment of 1 percent of lottery funds for Sports Lottery.

FIGURE 7



Oregon Opportunity Grant

The OOG is Oregon's largest state-funded, need-based grant program for college students. During the current biennium, the legislature appropriated \$109.5 million to the program. Awards are prioritized according to each student's federal calculated expected family contribution (EFC), starting with EFCs of \$0, until OOG funds are exhausted. During the 2020–21 academic year, students with an EFC of \$3,500 or less received a \$3,600 grant.

The process by which the Office of Student Access and Completion (OSAC) allocates funding ensures that those students with the most need are served first. However, because the OOG is chronically underfunded, many students with a high degree of need do not receive any state aid. Approximately 15,000 students who qualify for the Federal Pell Grant that provides assistance to students with an EFC of \$5,576 or less (that amount increased from \$5,486 in 2018–19) are not supported by the OOG. In addition, an untold number of potential students are not served because they do not apply and/or they do not attend. Because the \$2,250 Opportunity Grant covers approximately 10 percent of the total cost of attendance, many students are unable to attend even if they qualify and are awarded a grant. Inadequate funding for the OOG can lead students on a pathway to high college debt. Further, if students cannot complete their education due to the high cost of attendance, they also lack the income to pay off that debt.

For the 2018–19 academic year, OSAC chose to implement a two-tiered award system with community college students receiving up to \$2,600 and four-year students receiving up to \$3,200. This decision addressed the higher cost of attendance at the four-year institutions and is preferable to retaining grants at a lower amount but extending them to more students. The Oregon Promise has increased the importance and awareness of the OOG for several reasons. First, 46 percent of community college students who participate in the Oregon Promise also receive supplemental aid from the OOG. Second, the Promise creates a new pathway for students who may ultimately transfer to four-year institutions. In the coming years, it is reasonable for universities to anticipate incoming transfer students with a higher level of need seeking the OOG to continue through to a four-year degree.

Oregon has set ambitious goals to increase the number of Oregonians attending and finishing college. Attaining these goals will rely on a sustained increase in funding for the OOG, especially for historically underserved populations and low-income families. Therefore, we are requesting an additional \$50 million for the OOG to fund the state's ambitious goals.

Conclusion

Oregon's public universities are eager to partner with the HECC, the legislature, and other stakeholders to realize the vision outlined in this consolidated funding request—continuing to serve students and provide a path to prosperity for Oregon families—and making intentional gains to close persistent equity gaps that exist today in the enrollment, retention, and completion of traditionally underserved students who represent the emerging majority of Oregonians.

This budget submission identifies various funding scenarios and their impact on students, institutions, and the state. Despite the many challenges ahead, a \$978 million investment in the PUSF, combined with targeted investments in student services and need-based financial aid will keep access and affordability a priority in Oregon. We should not simply settle for historical norms where students and their families are asked to bear the brunt of disproportionate cuts to higher education budgets in Oregon.

By funding the PUSF at the University Base Funding amount of \$978 million, and providing commensurate percentage increases to State Programs, Statewide Public Service Programs, and Sports Lottery, the governor and legislature can mitigate the trend of shifting the cost of education from the state and onto the backs of students and their families. With additional investments in Strong Start/summer bridge programs, benefits navigators, and the OOG, state leaders can provide needed funding to ensure students' basic needs are met, enabling them to maximize the opportunity provided by a college experience.

Communities and employers across the state rely on Oregon's postsecondary education system to be economic engines that lift individuals and entire regions of the state out of poverty and produce the educated workforce of tomorrow.

Finally, while the universities have made gains in closing achievement gaps for traditionally underserved students, these efforts have been piecemeal rather than what could be achieved through consistent funding. Now is the time to align our efforts against longstanding and pandemic-exacerbated socioeconomic disparities. We must focus on supporting diverse students in getting in, getting through, and getting out. Therefore we are requesting a \$50 million Equity Achievement Investment. Targeted investments can help close the persistent gaps between students who have traditionally been represented on university campuses and those who have historically been underserved.

Together these investments will bring Oregon closer to delivering on the promise of an equitable path to success for all Oregonians.

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APPENDIX A

Summary of Higher Education Provisions in the Three Major Federal COVID-19 Relief Bills

CARES (March 27, 2020) The third COVID-19 package included \$13.9 billion for higher education in the Higher Education Emergency Relief Fund (HEERF). Ninety percent (just over \$12.5 billion) was distributed to institutions through a formula based on the proportion of Pell Grant and non-Pell Grant full-time-equivalent (FTE) students who were enrolled in in-person classes prior to the coronavirus emergency.

HEERF I as defined in CARES required that at least half the funds be distributed to students in the form of direct emergency grants for costs directly related to the shift to remote learning, including expenses related to food, housing, childcare, and technology. While not required by law, the US Department of Education guidance indicated that institutions should prioritize students with greatest need. Allowable uses for the institutional portion of funds were to defray expenses to shift to the delivery of instruction and to make additional financial aid grants to students. DACA students, undocumented students, and international students were prohibited from eligibility for emergency grants based on guidance issued by the US Department of Education.

CRRSAA/H.R. 133 (December 27, 2020) (HEERF II) Congress passed H.R.133, which included the Coronavirus Response and Relief Supplemental Appropriations Act (CRRSAA) of 2021, in late December 2020. This \$900 billion supplemental relief act provided \$22.9 billion to higher education nationally.

These funds were distributed through the HEERF structure, similar to the CARES Act but with some key differences around how the allocation was divided among public and private institutions, with some carve outs for HBCUs and Minority Serving Institutions and a revised distribution formula that allocated funds based upon a combination of student FTE and headcount measures weighted for Pell Grant participation.

HEERF II required institutions to spend at least the same dollar amount on direct emergency grants to students as they did with HEERF I. HEERF II also required institutions to prioritize students with financial need for emergency grants. It allowed any component of a student's cost of attendance to be an allowable use, including tuition.

Allowable uses for the institutional portion included defraying lost revenue, reimbursement for expenses already incurred, student support, and additional financial grants to students. No new guidance was provided about the eligibility of DACA, undocumented, or international students for emergency grants.

The American Rescue Plan Act President Biden signed the American Rescue Plan Act on March 11, 2021. The bill included \$39.58 billion in funding dedicated to higher education for a third HEERF disbursement. The bill uses the HEERF distribution formula compromise reached in CRRSAA.

Like the CARES Act, institutions are required to use at least half of the new funds for emergency financial aid grants to students (this is a key difference from HEERF II/CRRSAA). HEERF III continues to require institutions to prioritize need in making direct grants to students with higher need and continues the greater flexibility permitted under CRRSAA.

APPENDIX B

Public University Support Fund Scenarios

As part of its budget instructions, the HECC asks the universities to model several funding levels of PUSF using the SSCM. Note that the underlying data in the SSCM—enrollment, outcomes (degree completions), programmatic mix—all remain constant using FY22 data in these models; only the total PUSF amount changes. In reality, all these data points are interdependent.

It is important to note that the SSCM is an outcomes-driven model, therefore institutional allocations do not necessarily track with increases or decreases in state funding.

For context, the 2021–23 PUSF appropriation and annual allocation is shown below. The preliminary FY22 allocation has been made and will be trued-up in the fall when enrollment data is updated. FY23 allocations are estimated.

TABLE A1

2021-23 PUSF Appropriation and Annual Allocation								
	EOU	OIT	OSU	PSU	SOU	UO	WOU	Total
FY22	\$ 21,506,844	\$ 30,282,842	\$ 140,641,112	\$ 110,071,591	\$ 25,720,298	\$ 82,307,597	\$ 30,469,719	\$ 441,000,002
FY23 Est Allocation	\$ 21,985,302	\$ 29,170,730	\$ 147,204,488	\$ 115,843,115	\$ 26,688,804	\$ 86,376,679	\$ 31,730,880	\$ 458,999,998
2021-23 Total	\$ 43,492,146	\$ 59,453,572	\$ 287,845,600	\$ 225,914,706	\$ 52,409,102	\$ 168,684,276	\$ 62,200,599	\$ 900,000,000

Scenario A.1—Status Quo or University Base Funding

The University Base Funding cost estimates the state resources needed to continue the current level of programs and learning outcomes, while assuming current enrollments, tuition, and levels of staffing. Expected cost increases factor in collective bargaining agreements; likely rate increases for health, retirement, and other employee benefits; and general inflation on supplies and services. Each university individually calculates its base funding cost. After comparative analysis to ensure consistency, the sum total constitutes the University Base Funding request. Note, however, that the SSCM is an outcomes-driven model and institutional allocations from the SSCM are not a pro rata share of increased state funding, nor do they match any individual institution's projected costs.

The calculation also assumes continuation of the current “fund split”—the portion of E&G expenses covered by the state in contrast to the portion covered by the university through student tuition. As has been the past practice in recent biennia, the University Base Funding request includes a state investment that would cover retirement cost increases only on the portion of the budget that is funded by the state.

For this iteration, the universities looked to the PERS Advisory Rates for 2023–25 (October 2021) to estimate retirement costs. Past practice has been to recalculate retirement cost estimates once PERS publishes official rates for the next biennium (2023–25 rates to be released October 2022). For the past two biennia, that review has resulted in a lower rate of increase. Because of the historic shift in inflationary pressures currently underway, the universities will also revisit general inflation assumptions at that time. As universities are already experiencing cost increases—in utilities for example—this could tip the adjusted calculation the other direction.

TABLE A2

HECC Scenario A.1: Status Quo (University Base Funding)									
	EOU	OIT	OSU	PSU	SOU	UO	WOU	Total	
FY24	\$ 22,597,005	\$ 30,192,214	\$ 154,113,567	\$ 121,386,808	\$ 27,569,534	\$ 90,439,899	\$ 32,920,973	\$ 479,220,000	
FY25	\$ 23,116,147	\$ 31,126,731	\$ 160,883,469	\$ 126,839,180	\$ 28,361,503	\$ 94,423,011	\$ 34,029,959	\$ 498,780,000	
2023-25 Total	\$ 45,713,152	\$ 61,318,945	\$ 314,997,036	\$ 248,225,988	\$ 55,931,037	\$ 184,862,910	\$ 66,950,932	\$ 978,000,000	
<i>Change from 2021-23 PUSF</i>	<i>\$ 2,221,006</i> 5.1%	<i>\$ 1,865,373</i> 3.1%	<i>\$ 27,151,436</i> 9.4%	<i>\$ 22,311,282</i> 9.9%	<i>\$ 3,521,935</i> 6.7%	<i>\$ 16,178,634</i> 9.6%	<i>\$ 4,750,333</i> 7.6%	<i>\$ 78,000,000</i> 8.67%	

TABLE A3

Calculation of University Base Funding								
Education & General Expenses Public Universities Compiled	2021-23		2023-25					
	FY22 & FY23	Expense Share of Total	FY24 & FY25	Expense Share of Total	\$ Increase over 2021-23	Increase Share of Total	% Increase over 2021-23	Weighted Increase
Expenses								
Salary & Pay	1,858,040,172	50.1%	2,001,049,451	49.6%	143,009,280	44.4%	7.7%	3.9%
Health Benefits	390,338,196	10.5%	420,801,879	10.4%	30,463,683	9.5%	7.8%	0.8%
Retirement Benefits	420,179,373	11.3%	493,139,306	12.2%	72,959,933	22.7%	17.4%	2.0%
Other Benefits	249,506,051	6.7%	267,849,431	6.6%	18,343,380	5.7%	7.4%	0.5%
Supplies & Services	791,991,006	21.3%	849,012,442	21.1%	57,021,436	17.7%	7.2%	1.5%
Total expenses	3,710,054,797	100.0%	4,031,852,509	100.0%	321,797,712	100.0%	8.7%	8.67%
PUSF	900,000,000		978,000,000		78,000,000		8.67%	
Fund Split (State share)	24.3%		24.3%					

Reduction Scenarios

Scenario B.1—No Change in Total Funding from 2021–23 (Flat Funding)

The SSCM model was updated for the 2021–23 biennium. To avoid any single university experiencing a significant fluctuation in funding during the transition, a “hold harmless” feature was incorporated into the model. That feature is eliminated in future biennia. Thus, even though the total in this scenario remains unchanged from 2021 to 2023, the individual allocations vary the current biennium.

The flat funding represents a reduction scenario on two fronts. First, it does not cover unavoidable cost increases as calculated in the status quo/university base funding scenario. Second, because biennial allocations are 49 percent in year one of a biennium and 51 percent in year two, the change in allocation from FY23 (year two of 2021–23 at 51 percent) to FY24 (year one of 2023–25 at 49 percent) results in decreased resources for that fiscal year.

TABLE A4

HECC Scenario B.1: No Change in Total Funding from 2021-23 (Flat Funding)								
	EOU	OIT	OSU	PSU	SOU	UO	WOU	Total
FY24	\$ 21,507,563	\$ 28,310,747	\$ 140,974,516	\$ 110,825,595	\$ 25,959,998	\$ 82,711,238	\$ 30,710,343	\$ 441,000,000
FY25	\$ 21,985,302	\$ 29,170,730	\$ 147,204,489	\$ 115,843,116	\$ 26,688,804	\$ 86,376,679	\$ 31,730,880	\$ 459,000,000
2023-25 Total	\$ 43,492,865	\$ 57,481,477	\$ 288,179,005	\$ 226,668,711	\$ 52,648,802	\$ 169,087,917	\$ 62,441,223	\$ 900,000,000
<i>Change from 2021-23 PUSF</i>	\$ 719 0.0%	\$ (1,972,095) -3.3%	\$ 333,405 0.1%	\$ 754,005 0.3%	\$ 239,700 0.5%	\$ 403,641 0.2%	\$ 240,624 0.4%	\$ - 0.0%
<i>Change from FY23 to FY24</i>	\$ (477,739) -2.2%	\$ (859,983) -2.9%	\$ (6,229,972) -4.2%	\$ (5,017,520) -4.3%	\$ (728,806) -2.7%	\$ (3,665,441) -4.2%	\$ (1,020,537) -3.2%	\$ (17,999,998) -3.9%
<i>Variance with A.1. Status Quo/UBF</i>	\$ (2,220,287) -4.9%	\$ (3,837,468) -6.3%	\$ (26,818,031) -8.5%	\$ (21,557,277) -8.7%	\$ (3,282,235) -5.9%	\$ (15,774,993) -8.5%	\$ (4,509,709) -6.7%	\$ (78,000,000) -8.0%

Scenario B.2—10% Decrease from Incremental Funding in Status Quo

TABLE A5

HECC Scenario B.2: 10% decrease from the incremental funding in the Status Quo/University Base Funding Scenario								
	EOU	OIT	OSU	PSU	SOU	UO	WOU	Total
FY24	\$ 21,034,397	\$ 27,687,909	\$ 137,873,077	\$ 108,387,434	\$ 25,388,879	\$ 80,891,591	\$ 30,034,713	\$ 431,298,000
FY25	\$ 21,501,624	\$ 28,528,975	\$ 143,965,990	\$ 113,294,568	\$ 26,101,651	\$ 84,476,391	\$ 31,032,801	\$ 448,902,000
2023-25 Total	\$ 42,536,021	\$ 56,216,884	\$ 281,839,067	\$ 221,682,002	\$ 51,490,530	\$ 165,367,982	\$ 61,067,514	\$ 880,200,000
<i>Change from 2021-23 PUSF</i>	\$ (956,125) -2.2%	\$ (3,236,688) -5.4%	\$ (6,006,533) -2.1%	\$ (4,232,704) -1.9%	\$ (918,572) -1.8%	\$ (3,316,294) -2.0%	\$ (1,133,085) -1.8%	\$ (19,800,000) -2.2%
<i>Change from FY23 to FY24</i>	\$ (950,905) -4.3%	\$ (1,482,821) -5.1%	\$ (9,331,411) -6.3%	\$ (7,455,681) -6.4%	\$ (1,299,925) -4.9%	\$ (5,485,088) -6.4%	\$ (1,696,167) -5.3%	\$ (27,701,998) -6.0%
<i>Variance with A.1. Status Quo/UBF</i>	\$ (3,177,131) -7.0%	\$ (5,102,061) -8.3%	\$ (33,157,969) -10.5%	\$ (26,543,986) -10.7%	\$ (4,440,507) -7.9%	\$ (19,494,928) -10.5%	\$ (5,883,418) -8.8%	\$ (97,800,000) -10.0%

Impacts of Reduction Scenarios

Overall

The 10 percent reduction scenario represents a significant setback. There are fewer options to address this level of cut due to years of managing through the pandemic.

Options to safeguard access and support for degree completion by historically underrepresented students

The universities have provided specific support for underrepresented students through the use of consistently maintained targeted fee remissions. While adjusting tuition rates is often proposed as the optimal method to ensure access and affordability, allowing tuition rates to stay and grow within a reasonable window of market conditions accompanied by stability and growth in targeted remissions provides a more sustainable and effective approach to supporting the most vulnerable populations. From FY19 to FY21, total remissions by all public universities grew by 28 percent. In a reduction environment, the universities would remain committed to targeted remissions.

Types of Measures Necessary to Remain Financially Viable

Whenever state resources are reduced, the universities have a finite set of available options. Each university would deploy the mix of options best suited to its own financial circumstances. Variances between flat funding and a 10 percent reduction would just be a matter of degree.

Reduce expenses

Potential options include personnel actions such as pay cuts, furloughs, and layoffs (only to the extent not precluded by collective bargaining agreements); hiring freezes; and holding unfilled positions open. Programs and services can be curtailed or eliminated. Select expenditures can be managed, such as limiting travel.

Increase other revenues

Universities' primary operating revenues consist of state appropriations, tuition, indirect recoveries, and interest earnings. Net tuition revenue represents around 65 percent of universities' operating revenues. In recent years, significant increase to tuition has become less of an option. While graduate programs and nonresident tuition rates are competitive on a national scale, families are increasingly unable and unwilling to pay higher costs.

Indirect cost recoveries are reimbursements of facility and administrative costs incurred on research grants based on rates negotiated with the federal government. They are driven by the level of research productivity and not a predictable resource for filling other revenue gaps.

Interest earnings are market driven. When revenues are decreasing, there is less cash to invest and it cannot be counted on as a resource to replace reduced state appropriations.

Use of reserves

While universities follow best practices and maintain limited reserves, use of reserves to fill funding gaps is a one-time option that does not permanently solve budget issues. Often, however, it takes time to implement large budget cuts and, in those circumstances, universities are forced to draw down reserves until permanent reductions can be fully implemented.

The *COVID-19 Impacts* section of this document has multiple examples of each category that illustrate the types of actions that could again be deployed in a reduction scenario.

Impact to key educational, public service, and research activities, including impact to student outcomes, access, affordability, and underrepresented populations

Even if a university elects to fully protect direct educational activities and all direct student services, cuts to other activities and administrative support eventually will impact the student experience.

Increase Scenarios

Scenario B.3—10% Increase to Incremental Funding in Status Quo

This scenario would allow significant progress on multiple fronts. At \$97.8 million beyond University Base Funding, this level would be able to incorporate the equity program elements described in the Equity Achievement Investments section of this document. Tuition increases would be less. Fee remissions could be significantly increased. Student services could be expanded.

TABLE A6

HECC Scenario B.3: 10% increase to the incremental funding in the Status Quo/University Base Funding Scenario									
	EOU	OIT	OSU Total	PSU	SOU	UO	WOU	Total	
FY24	\$ 23,868,905	\$ 32,481,783	\$ 170,699,826	\$ 134,745,118	\$ 29,509,855	\$ 100,198,524	\$ 35,637,989	\$ 527,142,000	
FY25	\$ 24,439,961	\$ 33,509,753	\$ 178,146,719	\$ 140,742,727	\$ 30,381,020	\$ 104,579,948	\$ 36,857,872	\$ 548,658,000	
2023-25 Total	\$ 48,308,866	\$ 65,991,536	\$ 348,846,545	\$ 275,487,845	\$ 59,890,875	\$ 204,778,472	\$ 72,495,861	\$ 1,075,800,000	
<i>Change from 2021-23 PUSF</i>	\$ 4,816,720 11.1%	\$ 6,537,964 11.0%	\$ 61,000,945 21.2%	\$ 49,573,139 21.9%	\$ 7,481,773 14.3%	\$ 36,094,196 21.4%	\$ 10,295,262 16.6%	\$ 175,800,000 19.5%	
<i>Variance with A.1. Status Quo/UBF</i>	\$ 2,595,714 5.7%	\$ 4,672,591 7.6%	\$ 33,849,509 10.7%	\$ 27,261,857 11.0%	\$ 3,959,838 7.1%	\$ 19,915,562 10.8%	\$ 5,544,929 8.3%	\$ 97,800,000 10.0%	

Scenario B.4—20% Increase to Incremental Funding in Status Quo

This level of funding would be a game-changer. Significant resources would be available to advance equity efforts.

TABLE A7

HECC Scenario B.4: 20% increase to the incremental funding in the Status Quo/University Base Funding Scenario									
	EOU	OIT	OSU Total	PSU	SOU	UO	WOU	Total	
FY24	\$ 25,140,803	\$ 34,771,353	\$ 187,286,090	\$ 148,103,429	\$ 31,450,174	\$ 109,957,149	\$ 38,355,002	\$ 575,064,000	
FY25	\$ 25,763,775	\$ 35,892,775	\$ 195,409,971	\$ 154,646,273	\$ 32,400,538	\$ 114,736,884	\$ 39,685,784	\$ 598,536,000	
2023-25 Total	\$ 50,904,578	\$ 70,664,128	\$ 382,696,061	\$ 302,749,702	\$ 63,850,712	\$ 224,694,033	\$ 78,040,786	\$ 1,173,600,000	
<i>Change from 2021-23 PUSF</i>	\$ 7,412,432 17.0%	\$ 11,210,556 18.9%	\$ 94,850,461 33.0%	\$ 76,834,996 34.0%	\$ 11,441,610 21.8%	\$ 56,009,757 33.2%	\$ 15,840,187 25.5%	\$ 273,600,000 30.4%	
<i>Variance with A.1. Status Quo/UBF</i>	\$ 5,191,426 11.4%	\$ 9,345,183 15.2%	\$ 67,699,025 21.5%	\$ 54,523,714 22.0%	\$ 7,919,675 14.2%	\$ 39,831,123 21.5%	\$ 11,089,854 16.6%	\$ 195,600,000 20.0%	

Impacts of Increase Scenarios

Options to safeguard access and support for degree completion by historically underrepresented students

These scenarios would go beyond safeguarding access and support to providing significant expansion of remissions and services.

Types of measures necessary to remain financially viable

While resources would be increasing under these scenarios, the universities, in conjunction with their governing boards, would develop plans to thoughtfully and strategically deploy these resources. Important considerations would be sustainability of impact, knowing that state funding cycles are consistently cyclic and these levels of funding may or may not persist into the future.

Impact to key educational, public service, and research activities, including impact to student outcomes, access, affordability, and underrepresented populations

Potentially all activities would be positively impacted to some degree under the increase scenarios.

Scenario B.5: Funding level needed to contain tuition/fee increases for resident undergraduate students to no more than five percent per year

The question of what funding level would be needed to keep resident, undergraduate tuition rate increases at or below five percent for all campuses remains challenging to answer due to the different financial situations at each institution. Each campus is faced with unique fiscal challenges due to their current fund balances, operating surplus/deficit, tuition rates, labor agreements, retention rates, and recruiting challenges.

It is important to note that although the current service level calculations used by DAS and the University Base Funding calculations look at the increase of aggregate costs across the institutions, the SSCM does not distribute PUSF funds based on cost increases but instead allocates funds based on activity levels (student credit hours) and outcomes (degree completions), as was its intention. SSCM modeling suggests that for *all* universities to achieve resident undergraduate tuition rate increases at or below five percent, the PUSF would need to increase by \$156.3 million. For *most* institutions to keep resident undergraduate tuition increases at or below five percent, state investment would need to increase by \$149.7 million, bringing the PUSF to \$1.05 billion.

APPENDIX C—PRO FORMA ANALYSIS

As part of the funding scenario analysis for the public universities' CFR, the HECC asked the universities to "Provide an annual E&G pro forma through FY2025 that includes projected revenues, expenses and changes in fund balance. Describe the likely annual impact on tuition and fees by category (resident versus non-resident) for each institution." This is similar to information provided by the community colleges to the HECC, but the public universities operate in a different environment that makes the level of detail requested for each university quite challenging:

- Universities have multiple tuition rates: resident, nonresident, undergraduate, graduate, program-specific, entering cohort-specific, guaranteed rates, etc. Because nonresident rates and graduate program rates are subject to national markets, increases in those rates could not be used to fully address any revenue gaps. Additionally, tuition waiver policies vary across student types and universities. Given the complexity of universities' rate structures, it would be misleading to simply equate revenue increases with rate increases.
- The universities have statutorily defined processes to ensure student input on tuition rates and governing boards are charged with establishing the rates. Tuition and fee revenue data for future fiscal years is not projected on a by-university basis to avoid any real or perceived conflicts with those processes and responsibilities.

Given this context, the pro forma calculation below is organized on a high level to isolate gaps, pressures, or enhancements the public universities would experience for each state funding scenario at three different levels of net tuition and fee revenue across all universities. Addressing any funding gap seen in a particular combination of scenarios does not imply or predict the actual funding decisions that universities' governing boards will make. We do know that as universities seek to stabilize affordability, tuition increases cannot fully address gaps in state funding. Funding gaps are likely to be addressed by some combination of tuition increases, expense/program reductions (within the limits of collective bargaining agreements), and use of reserves to the extent available. Approaches will vary across institutions.

TABLE A8

Total E&G Revenue & Expenses	2021-23 Projected			2023-25 Projected													
	FY22	FY23		FY24						FY25							
UNIVERSITY: All				Net Tuition and Fee Revenue Scenarios													
Revenues																	
Gross tuition and fees	1,340,546,354	1,411,709,391															
Less fee remissions	(181,113,629)	(202,924,463)															
Net tuition and fee revenue	1,159,432,725	1,208,784,927	4.3%	1,220,872,777	1.0%	1,245,048,475	3.0%	1,269,224,174	5.0%	1,233,081,505	1.0%	1,282,399,929	3.0%	1,332,685,383	5.0%		
State operating appropriations (HECC Scenario B.1.)	466,317,930	485,912,572	4.2%	466,592,946	-4.0%	466,592,946	-3.9%	466,592,946	-3.9%	485,637,556	4.1%	485,637,556	4.1%	485,637,556	4.1%		
All other revenues:																	
State debt service appropriations	5,388,824	5,368,701		5,368,701	0.0%	5,368,701	0.0%	5,368,701	0.0%	5,368,701	0.0%	5,368,701	0.0%	5,368,701	0.0%		
Indirect cost recovery	84,470,031	86,978,017	3.0%	89,587,357	3.0%	89,587,357	3.0%	89,587,357	3.0%	92,274,978	3.0%	92,274,978	3.0%	92,274,978	3.0%		
All other (excluding indirect cost)	66,283,956	69,606,221	5.0%	73,086,532	5.0%	73,086,532	5.0%	73,086,532	5.0%	76,740,859	5.0%	76,740,859	5.0%	76,740,859	5.0%		
Total revenues	1,781,893,465	1,856,650,439	4.2%	1,855,508,313	-0.1%	1,879,684,011		1,903,859,710		1,893,103,599	2.0%	1,942,422,023		1,992,707,477			
Expenses				University Base Funding Calculation						University Base Funding Calculation						Increase over 2021-23 Wgtd Incr	
Salary & Pay	910,508,006	947,532,166		982,220,935		982,220,935		982,220,935		1,018,828,516		1,018,828,516		1,018,828,516		143,009,280 7.70% 3.85%	
OPE Health	191,249,937	199,088,259		206,529,104		206,529,104		206,529,104		214,272,775		214,272,775		214,272,775		30,463,683 7.80% 0.82%	
OPE Retirement	206,046,121	214,133,252		242,401,254		242,401,254		242,401,254		250,738,052		250,738,052		250,738,052		72,959,933 17.36% 1.97%	
OPE Other	122,483,391	127,022,660		131,535,249		131,535,249		131,535,249		136,314,182		136,314,182		136,314,182		18,343,380 7.35% 0.49%	
S&S (+ all other)	381,642,792	410,348,213		419,578,411		419,578,411		419,578,411		429,434,031		429,434,031		429,434,031		57,021,436 7.20% 1.54%	
Total expenses	1,811,930,247	1,898,124,551	4.8%	1,982,264,953	4.4%	1,982,264,953	4.4%	1,982,264,953	4.4%	2,049,587,556	3.4%	2,049,587,556	3.4%	2,049,587,556	3.4%	321,797,712 8.67% 8.67%	
B.1 No change in total funding (PUSF flat at \$900,000,000; reallocated 49% FY24, 51% FY25)				HECC Funding Scenarios												-	
Net	(30,036,781)	(41,474,111)		(126,756,640)		(102,580,942)		(78,405,243)		(156,483,957)		(107,165,533)		(56,880,079)			
Beginning fund balance	361,870,386	331,833,605		290,359,493		290,359,493		290,359,493		163,602,853		187,778,551		211,954,250			
Ending fund balance	331,833,605	290,359,493		163,602,853		187,778,551		211,954,250		7,118,896		80,613,018		155,074,171			
No. of months of expenditures				1.0		1.1		1.3		0.0		0.5		0.9			
A.1 Status Quo (University Base Funding)																	
Change in PUSF from \$900,000,000 to \$978,000,000				38,220,000		38,220,000		38,220,000		39,780,000		39,780,000		39,780,000		78,000,000	
Revised Net				(88,536,640)		(64,360,942)		(40,185,243)		(116,703,957)		(67,385,533)		(17,100,079)			
Revised ending fund balance				201,822,853		225,998,551		250,174,250		46,898,896		120,393,018		194,854,171			
No. of months of expenditures				1.2		1.4		1.5		0.3		0.7		1.1			
B.2 10% decrease to incremental funding in A.1.																	
Change in PUSF from \$900,000,000 to \$880,200,000				(9,702,000)		(9,702,000)		(9,702,000)		(10,098,000)		(10,098,000)		(10,098,000)		(19,800,000)	
Revised Net				(136,458,640)		(112,282,942)		(88,107,243)		(166,581,957)		(117,263,533)		(66,978,079)			
Revised ending fund balance				153,900,853		178,076,551		202,252,250		(2,979,104)		70,515,018		144,976,171			
No. of months of expenditures				0.9		1.1		1.2		(0.0)		0.4		0.8			
B.3 10% increase to incremental funding in A.1.																	
Change in PUSF from \$900,000,000 to \$1,075,800,000				86,142,000		86,142,000		86,142,000		89,658,000		89,658,000		89,658,000		175,800,000	
Revised Net				(40,614,640)		(16,438,942)		7,736,757		(66,825,957)		(17,507,533)		32,777,921			
Revised ending fund balance				249,744,853		273,920,551		298,096,250		96,776,896		170,271,018		244,732,171			
No. of months of expenditures				1.5		1.7		1.8		0.6		1.0		1.4			
B.4 20% increase to incremental funding in A.1.																	
Change in PUSF from \$900,000,000 to \$1,173,600,000				134,064,000		134,064,000		134,064,000		139,536,000		139,536,000		139,536,000		273,600,000	
Revised Net				7,307,360		31,483,058		55,658,757		(16,947,957)		32,370,467		82,655,921			
Revised ending fund balance				297,666,853		321,842,551		346,018,250		146,654,896		220,149,018		294,610,171			
No. of months of expenditures				1.8		1.9		2.1		0.9		1.3		1.7			
																Increase over 2021-23	Wgtd Incr
																143,009,280	7.70%
																30,463,683	7.80%
																72,959,933	17.36%
																18,343,380	7.35%
																57,021,436	7.20%
																321,797,712	8.67%
																	8.67%

APPENDIX D—DETAILED APPROPRIATION TABLES

TABLE A9

2023-25 Public Universities Consolidated Funding Request					
Appropriation Category State General Fund (GF) Lottery Funds (LF)		2019-21 Final LAB	2021-23 LAB Through 2022 Session	2023-25 Consolidated Funding Request	
Public University Support Fund	GF	836,898,583	900,000,000	1,028,000,000	14.2%
State Programs					
Ongoing	GF	42,362,415	62,026,239	75,688,350	22.0%
Targeted/One-time	GF	2,350,000	80,603,876	-	
Subtotal State Programs		44,712,415	142,630,115	75,688,350	
Subtotal Education & General (E&G)		881,610,998	1,042,630,115	1,103,688,350	5.9%
Statewide Public Services (SWPS)					
Agricultural Experiment Station (AES)	GF	76,058,861	84,882,999	93,414,733	10.1%
AES one-time	GF	125,000	2,830,000		
Extension Service (ES)	GF	56,002,403	59,293,902	65,297,908	10.1%
ES one-time			1,250,000		
Forest Research Laboratory (FRL)	GF	11,424,041	12,095,480	13,320,249	10.1%
Subtotal SWPS		143,610,305	160,352,381	172,032,890	
Sports Lottery	LF	14,099,809	16,514,607	17,830,000	8.0% (1)
Outdoor School (Administered by ES)	LF	45,305,847	49,418,728	54,678,000	10.6% (2)
1) Statutory 1% Per March 2022 OEA Revenue Forecast 2) Per Ballot Measure 99 (2016), the lesser of 4% of Lottery transfers (adjusted for inflation) - \$54,678,000 as of March 2022 OEA Revenue Forecast - or \$22M per year					

TABLE A10

State Programs	Legislative Origin	2007-09 Final* LAB ¹	2009-11 Final* LAB ¹	2011-13 Final* LAB ¹	2013-15 Final* LAB	2015-17 Final* LAB	2017-19 Final* LAB	2019-21 Final* LAB	2021-23 Through 2022 Session	Increase Over 2019-21	2023-25 Request Development		
											University Base Costs	+ Unfunded portion of 2021- 23 UBF ²	= Total Request
Engineering Technology Sustaining Funds (ETSF, previously ETIC)	SB 504 (1997)	37,280,000	30,981,350	27,387,573	14,225,106	24,451,274	25,596,618	27,004,433	28,591,600	5.88%	31,070,492	416,248	31,486,740
OSU (w UO) TallWood Design Institute (prev Ctr for Advanced Wood Products)	SB 5507 (2015)					2,500,000	3,558,605	3,754,328	3,974,986	5.88%	4,319,617	57,869	4,377,486
UO & PSU Dispute Resolution programs (65/35%, 60/40% in 2019-21) ²	SB 904 (2003)	2,267,275	2,107,233	2,297,895	2,435,769	2,516,149	2,634,011	2,429,882	2,921,696	20.24% ²	3,175,007	37,454	3,212,461
PSU Oregon Solutions	HB 3948 (2001)	2,600,000	2,416,355	2,061,637	2,185,335	2,257,451	2,363,195	2,493,171	2,639,705	5.88%	2,868,567	38,430	2,906,997
OSU Fermentation Science	HB 5008 (2013)				1,200,000	1,239,600	1,297,665	1,369,036	1,449,500	5.88%	1,575,172	21,102	1,596,274
UO (47.5%), OSU (47.5%), and PSU (5.0%) Signature Research	HB 5077 (2003)	1,143,186	950,315	950,316	1,007,335	1,040,577	1,089,319	1,149,231	1,216,776	5.88%	1,322,270	17,715	1,339,985
UO Labor Education Research Center (LERC) ³	(1977)	696,936	649,089	657,542	656,867	678,544	710,328	1,098,396	1,162,953	5.88%	1,263,781	16,931	1,280,712
OSU Marine Research Vessel program	HB 3451 (2013)				300,000	619,800	648,833	684,519	724,751	5.88%	787,587	10,551	798,138
OIT Oregon Renewable Energy Center (OREC)	HB 5006 (2017)					500,000	527,500	558,503	558,503	5.88%	606,925	8,131	615,056
PSU Population Research Center	(1956)	472,744	439,187	374,427	421,407	435,313	455,705	480,769	509,026	5.88%	553,159	7,410	560,569
OSU Institute for Natural Resources	HB 3948 (2001)	459,675	427,196	364,484	386,353	399,103	417,797	440,776	466,682	5.88%	507,143	6,794	513,937
Clinical Legal Education program (currently UO)	HB 2961 (2007)	231,678	331,750	318,450	337,557	348,077	364,381	384,422	407,016	5.88%	442,304	5,926	448,230
OSU Climate Change Research Institute	HB 3543 (2007)	180,000	334,858	285,701	302,843	312,837	327,490	345,502	365,809	5.88%	397,525	5,325	402,850
OSU Veterinary Diagnostic Lab	SB 5528 (2021) & HB 5006 (2022)								2,990,855		3,250,162	-	3,250,162
Benefits Navigators	HB 2835 (2021)								1,634,150		1,775,831	-	1,775,831
Strong Start (one-time in 2021-23, request ongoing support in 2023-25)									12,200,000				20,000,000
Programs Subsequently Transferred Out		1,820,349	1,512,823	1,290,744	1,368,185	250,431	452,162	200,450	212,231				
Rounding		-	-	-	-	-	1	-	-		-	-	-
Subtotal Ongoing State Programs		47,151,843	40,150,156	35,988,769	24,826,757	37,049,156	40,416,110	42,362,415	62,026,239		53,915,542	649,886	74,565,428
<i>Increase over prior biennium</i>			-14.8%	-10.4%	-31.0%	49.2%	9.1%	14.3%	53.5%		-13.08%		20.2%
Targeted Appropriations Continuing into 2023-25													
OSU College of Ag Channel Study	HB 2437 (2019)							239,583	234,553		178,285		178,285
PSU PRC Environmental Justice Mapping Tool	HB 4077 (2022)								82,664		185,599		185,599
OSU INR-Environmental Justice Mapping Tool	HB 4077 (2022)								108,691		210,998		210,998
OSU Wildfire risk map, plan for landscape restoration													
College of Forestry	HB 762 (2021)								950,000		360,000 ⁴		360,000
Institute of Natural Resources	HB 762 (2021)								165,000		165,000		165,000
Extension Service	HB 762 (2021)								23,040		23,040		23,040
Prior Biennia Targeted/One-time		-	-	-	929,000	2,498,707	3,850,000	2,350,000	79,039,928	**	-	-	-
Subtotal Targeted		-	-	-	929,000	2,498,707	3,850,000	2,589,583	80,603,876		1,122,922	-	1,122,922
State Programs Total		47,151,843	40,150,156	35,988,769	25,755,757	39,547,863	44,266,110	44,951,998	142,630,115		55,038,464	649,886	75,688,350
			-14.8%	-10.4%	-28.4%	53.5%	11.9%	13.7%	222.2%		-61.4%		-46.9%
* "Final" legislative budgets are end-of-biennium actual appropriations inclusive of any mid-biennium reductions, Emergency Board (E-Board) actions, and one-time funding													
1) For biennia prior to 2013-15, E&G appropriations are retroactively split into PUSF and State Programs categories for comparison purposes													
2) HB 5050 (2019) transferred \$349,000 from UO's Dispute Resolution to the LERC at UO; previously Dispute Resolution funding was split 65% to UO, 35% to PSU; effective with this 2019 transfer, the resulting shares were 60% UO, 40% PSU; with HB 5006 (2021), this funding was restored to UO, returning the split to 65% UO, 35% PSU; this restoration accounts for the larger percentage increase over 2019-21													
3) The University Base Funding for 2021-23 was an increase of 7.42% over 2019-21, but only 5.88% was funded; this request includes a make-up provision for that shortfall. HB 5006 (2021) did adjust Vet Diagnostic Lab support to 7.42% UBF.													
4) College of Forestry fiscal impact inadvertently used an annual amount of \$180,000, this corrects it to the biennial amount of \$360,000.													
** Details of one-time funding in 2021-23:													
<u>2021 Session</u>													
HB 5006-OIT Center of Excellence in Applied Computing									5,500,000				
HB 5006-PSU Center for Women's Leadership-New Leadership Oregon									1,000,000				
HB 5006-OSU Wind Energy/Avian death study									427,083				
HB 2785-OSU Clark Meat Science Center upgrades									300,000				
HB 3114-OSU HMSC Molluscan Broodstock									170,000				
HB 3114-OSU Cooperative Institute for Marine Resources Studies									100,000				
HB 3114-OSU CEOAS Ocean Acidification									100,000				
<u>2021 2nd Special Session</u>													
SB 5561-OSU OCCRI									250,000				
SB 5561-OSU College of Agriculture									250,000				
<u>2022 Session</u>													
HB 5202-Strong Start (\$7.5M one-time, shown above in request for ongoing)													
HB 5202-UO College of Ed child abuse study									700,000				
HB 5202-PSU childcare recruitment & retention									21,000,000				
HB 5202-UO scientific equipment									10,142,845				
HB 5202-WOU steam line replacement									16,500,000				
HB 5202-OSU Hatfield Housing project									6,500,000				
HB 5202-UO Oregon Hazards Lab Wildfire Camera Network									4,500,000				
HB 5202-OSU repair/maintenance of research vessel									350,000				
HB 5202-OSU-Innovation District Landfill project									10,000,000				
HB 5202-EOU Visual and Performing Scholarship									1,000,000				
HB 5202-OSU modernization of OR Ag Research Ctr									250,000				
									79,039,928				

TABLE A11

Statewide Public Services (SWPS)	2007-09 Final* LAB	2009-11 Final* LAB	2011-13 Final* LAB	2013-15 Final* LAB	2015-17 Final* LAB	2017-19 Final * LAB	2019-21 Final * LAB	2021-23 LAB Through 2022 Session	Increase Over 2019-21	2023-25 Request Development					
										University Base Costs		+ Unfunded portion of 2021- 23 UBF²	= Total Request		
State General Fund															
Agricultural Experiment Station (AES)	58,937,209	53,498,403	51,793,494	55,275,282	63,121,066	66,088,861	76,058,861	80,529,163	5.88%	87,511,041	8.67%	1,172,378	88,683,419		
SB 5528 (2021) AES for SWPS Facilities Maintenance transferred from PUSF											4,353,836	4,731,314	8.67%	-	4,731,314
								84,882,999		92,242,355	8.67%	1,172,378	93,414,733		
Extension Service (ES)	42,642,380	39,087,553	37,463,402	39,909,526	45,601,540	47,717,403	56,002,403	59,293,902	5.88%	64,434,683	8.67%	863,225	65,297,908		
Forest Research Laboratory (FRL)	6,590,714	5,829,217	5,698,684	6,070,772	9,771,107	10,224,041	11,424,041	12,095,480	5.88%	13,144,158	8.67%	176,091	13,320,249		
SWPS Total	108,170,303	98,415,173	94,955,580	101,255,580	118,493,713	124,030,305	143,485,305	156,272,381		169,821,196	8.67%	2,211,694	172,032,890		
Increase over prior biennium		-9.0%	-3.5%	6.6%	17.0%	4.7%	15.7%	8.9%		8.7%			10.1%		
Targeted/One-time SWPS funding															
HB 5202 (2022) ES Bee Project								1,000,000							
HB 5006 (2021) AES Wine Research								2,680,000							
HB 5006 (2021) AES Berry Research								150,000							
SB 5561 (2021 2nd Spec) Extension programs (technical support to farmers; drought resistant crops; survey)								1,250,000							
HB 5050 (2019) AES Berry Initiative							125,000	-							
HB 5006 (2017) AES positions						380,000	-	-							
Subtotal One-time						380,000	125,000	5,080,000							
Lottery Funds															
Outdoor School (Administered by Extension Service)¹						24,000,000	45,305,847	49,418,728					54,678,000		

TABLE A12

Sports Lottery	2007-09 Actuals ¹		2009-11 Actuals ²		2011-13 Actuals ²		2013-15 Actuals ³		2015-17 Actuals ³		2017-19 Actuals ³		2019-21 Actuals ⁴		2021-23 Actuals		2023-25 Estimated ⁵
EOU	920,979	7.5%	735,207	7.6%	653,078	7.8%	886,640	11.1%	913,239	11.1%	913,239	11.1%	2,440,561	17.3%	2,858,543	17.3%	
OIT	915,870	7.5%	735,207	7.6%	653,078	7.8%	886,640	11.1%	913,239	11.1%	913,239	11.1%	2,440,560	17.3%	2,858,543	17.3%	
OSU	2,946,595	24.1%	2,300,009	23.8%	1,949,531	23.2%	1,000,000	12.5%	1,030,000	12.5%	1,030,000	12.5%	1,030,000	7.3%	1,206,401	7.3%	
PSU	2,349,294	19.2%	1,835,926	19.0%	1,640,866	19.5%	2,211,230	27.6%	2,277,567	27.6%	2,277,567	27.6%	2,277,567	16.2%	2,667,633	16.2%	
SOU	918,992	7.5%	735,207	7.6%	653,078	7.8%	886,640	11.1%	913,239	11.1%	913,239	11.1%	2,440,560	17.3%	2,858,543	17.3%	
UO	3,017,636	24.7%	2,387,020	24.7%	2,022,010	24.1%	1,000,000	12.5%	1,030,000	12.5%	1,030,000	12.5%	1,030,000	7.3%	1,206,401	7.3%	
WOU	1,163,245	9.5%	936,508	9.7%	833,849	9.9%	1,128,850	14.1%	1,162,716	14.1%	1,162,716	14.1%	2,440,561	17.3%	2,858,543	17.3%	
Total	12,232,611	100.0%	9,665,082	100.0%	8,405,489	100.0%	8,000,000	100.0%	8,240,000	100.0%	8,240,000	100.0%	14,099,809	100.0%	16,514,607	100.0%	17,830,000
<p>Per Ballot Measure 99 (2016), the lesser of 4% of Lottery transfers or \$22 million per year is transferred to the Outdoor Education Account. Adjusted annually for inflation.</p> <p>¹ 2007-09 initial distribution of statutory 1%</p> <p>² Legislature capped total Sports Lottery allocation</p> <p>³ Legislature capped total Sports Lottery allocation as well as OSU and UO individually</p> <p>⁴ Funding restored to statutory 1% but legislatively directing all of increase to the TRUs, capping OSU, PSU, and UO at 2017-19 levels</p> <p>⁵ Total Request per March 2022 OEA forecast: 17,830,000</p>																	

APPENDIX E—EQUITY ACHIEVEMENT INVESTMENTS



Access, Retention, and Career Readiness Programs for Underrepresented Students at Oregon Tech – Equity Investment

As the state of Oregon’s official Polytechnic University, Oregon Tech recognizes that our students have a unique set of challenges that require specific types of intervention to ensure their success. Oregon Tech is committed to supporting our underrepresented students through holistic support programs and student wraparound services that address our students’ lived experiences and the unique challenges in Oregon Tech education may present.

I. Bridge Programs

Investing in bridge programs that can be uniquely tailored and offered to upper-level high school students and additionally for students transferring from a two-year college. These programs are intended to provide a seamless connector between K-12 and college. These programs are vital to Oregon Tech students who are often applying for highly sought-after programs of study. Oregon Tech Students are also presented with the additional challenges presented by our inverted curriculum.

- Concurrent course programming
- Collaborative pre-college academic counseling and advising
- College and Career pathway counseling that address the specific needs that OIT student encounter

II. Peer mentorship programming

Oregon Tech’s unique inverted curriculum makes the necessity for peer mentorship programming even more imperative. Oregon tech students are submersed in their academic programs early in their college careers. Pairing students with more experienced peers in their program of study is proven to improve overall academic performance and retention.

III. Develop rural student outreach programs to encourage rural populations to enroll in college - extension programs promote literacy in college access and admissions and are crucial to developing strategic partnerships.

a. Pre-college academic counseling and Advising

- i. students who receive precollege academic counseling and advising inter-college programs were prepared and with greater success. Career exploration is often the first step in academic counseling. Providing rural students access to career exploration and academic counseling dramatically increases the odds that a rural student will select a four-year university instead of pursuing the job market or a vocational school. This precollege counseling and advising is critical in educating rural communities on the importance of four-year education and dispelling common cultural myths about return on investment for four year degrees.

b. Consistent presence to encourage access

- i. Extension programs offer the opportunity to expand educational access through service-learning and community involvement. Community involvement is crucial in attracting local students. Rural students in particular benefit from these connections as the demonstrate how educational institutions and communities can work together to improve the community life.

IV. Institutional Emergency Grant Fund

a. TRIO Emergency Fund

- i. Last year Oregon Tech established an Emergency fund to assist students overcome unexpected financial hardship related to COVID-19 in an effort to increase and encourage retention of low-income students. Low-income students, a historically marginalized population in Higher Ed, currently make up approximately 60% of OIT students.
- ii. This fund was hugely successful as administered through our TRIO/TOP program. Unfortunately, this program is only grant funded to serve approximately 160 students on the Klamath Falls campus currently.

b. Institutional Fund

- i. Oregon Tech hopes to extend the benefits of such an emergency fund to all OIT students at all OIT campuses.
- ii. The success of the TOP fund demonstrates the need for this particular population on our campuses with historically low retention and completion rates.

V. Externship Grants

- a. As Oregon's premier polytechnic University our students are often faced with unique challenges in completing their degree programs. OIT's emphasis on applied learning requires many students to take on externships that are often unpaid and quite be restricting and obstacles to student completion. As such OIT would like to establish externship grants that allow students, who may not have persisted, to complete their externships without the added burden of loans.

VI. DACA Allyship and International Student Funds

- a. Translation services to increase access to program information.
- b. Bi-lingual admissions counselor
- c. DACA Allyship training funds
Training that addresses supporting undocumented students in admissions and financial aid.

Trauma-informed

Oregon specific training

These training programs would allow Oregon Tech to exceed the expectations of HB2787

Current programs to expand at Oregon Tech to help support Equity Investment

Oregon Tech (OIT) provides Polytechnic education and has designed an implemented a range of programming and services to address access, retention, and career readiness in our students. These programs may not be present at all OIT campuses as the result of funding and/or needs of specific populations may vary. Additional funding may be utilized to expand existing programs and add services to campus sites that are currently not supported.

TRIO Educational Talent Search and Upward Bound - TRIO ETS and UB are federally funded pre-college/access programs which support ~800 first-generation, low-income, and/or students with disabilities. Upward Bound supports students to improve study skills and academic plans in high school, develop their career, and education plans, and help to succeed in higher education. Talent Search is an educational access and information program that assists students in learning about careers and college majors.

TOP- The current, federally funded TOP program serves 160 first-generation students, low-income students, and students with disabilities who demonstrate academic need. The program's most recent graduation rate (2013 cohort) was 52%, which is 9% higher than the most recent graduation rate of TRIO eligible students not served. TOP's projected graduation rate for this year (2014 cohort) is 58% and for next year (2015 cohort) it is 70+%. The program's most recent persistence rate (Fall 2018 to Fall 2019) was 87.5%. Also, 94.4% of TOP students ended the 2018-19 academic year in good academic standing.

The institutionally funded TOP would serve 185 first-generation students, low-income students or students with disabilities on the Klamath Falls campus. This is 25 more students than the current federally funded TOP. The program will utilize the TRIO retention model to increase retention of TRIO-eligible students to 85% (a 12% increase) and the 6-year graduation rate to 53% (a 10% increase). The revenue benefit of achieving these objectives will equal \$339,295 in tuition and fees annually. Please see the TRIO Program proposal for details.

Oregon SOAR-ing to Success- SOAR is OIT's pre-orientation Bridge Program that was designed to focus on the integration of incoming students to our campus. When applying for the grant we had initially wanted to focus on 100 low-income, first-time, first-year students due to our efforts to help close the

opportunity gap. Understanding that Oregon “12% of low-income students receive a post-secondary credential by the age of 25.” As we began planning the program, we shifted to 25 students, having 21 go completely through the program.

From the assessment results that we collected we were able to see the impact that our program had on our students: Below are some data points that we found exciting to see:

- 42% are first-year students living off-campus; 58% living in on-campus housing
- 57% Oregon residents; 43% out-of-state residents
- 52% historically underrepresented racial/ethnic identity (students of color)
- 81% of our students are concerned about course load and assignment before coming to Oregon Tech

- Our results end in a 95% retention rate from the fall to winter term

Oregon MESA- The Oregon Tech Klamath Falls campus has recently joined Oregon MESA. This program serves more than **600** middle and high school students who are historically underrepresented in STEM fields. The foundation of Oregon MESA is to provide a school-based invention education program — the only adaptable, prototype-driven math, engineering, and science program for traditionally underrepresented students that takes an ecosystem approach to education.



Equity Investment Priorities

OSU has a number of effective programs that aid in equalizing success for underserved populations, as well as some promising new strategies on the horizon. An additional investment from the state would help strengthen, expand, and in some cases launch new programs and initiatives that would improve access to attend OSU, student's ability to persist and graduate, and strengthen OSU students' success in advancing to a career after graduation.

College Access

Access OSU: Families and communities are best served when they have clear information and preparation regarding the alternative pathways, benefits, and costs of pursuing university education. Access OSU is a new initiative led by OSU's Division of Extension and Engagement and the Division of Student Affairs to connect with community partners and provide prospective students and their families with knowledge and resources to prepare for and gain access to college. This program endeavors to work with communities across the state to engage both rural and urban families. Intended outcomes include:

- ✓ Oregon families believe in what an education at OSU can do to support their prosperity.
- ✓ Oregon families understand how to navigate applying to and funding college.
- ✓ Students experience a supportive community and resources at OSU.
- ✓ Underrepresented students have a positive experience at Oregon State University.
- ✓ Families and communities develop trust in OSU.
- ✓ Graduates return to their communities.
- ✓ Oregon communities and families thrive.

OSU is investing resources into this effort and a state investment would allow for a broader and more repaid impact.

Persistence and Completion

Academic Readiness: Students come to OSU with varying levels of readiness to jump into college-level courses and can benefit from a content refresher just before the term begins. OSU has started to offer content refresher sessions during OSUWelcome at no additional cost to students. Some of these sessions prepare students for a specific course (such as College Algebra or Differential Calculus) that they will begin the following week, while others focus on more general skills that can be applied across a number of course types such as writing sessions or tips and tricks from the Academic Success Center. Additional funding would allow for the expansion and scaling up of these offerings during OSUWelcome.

Supplemental Instruction: The Supplemental Instruction (SI) program at OSU delivers academic support for students in traditionally challenging courses. Students participate in SI study tables outside of class as a form of high impact group tutoring that builds community and confidence while practicing course content. SI has been shown to increase student course grades, student pass rates, and student retention; at OSU, students who complete SI regularly earn an average of a third of a letter grade higher than their peers in the class who did not participate, and SI participants successfully complete the course at a rate of 10% higher than non-SI participants. These results are particularly noteworthy for students of color, who participate in SI at higher rates than the general population in SI-supported courses.

SI supports courses that predominantly enroll first-and-second year students and that are often required for their major. Success in those courses is an important step in degree progression and completion. When students need to retake these courses due to low grades it increases their time to graduation and overall cost of attendance. Students who participate in SI appreciate help mastering the course content as well as the sense of belonging they experience. This broad-reaching program at OSU has historically served approximately 1,500 students per year (12,000 student contact hours); additional funding would allow for expansion of this successful practice.

Transfer Student Support: OSU has consistency seen an increase in transfer student enrollment, most notably in Ecampus, over the last ten years. Fall 2021 transfer enrollment was the highest it's been with 36% of the undergraduate student population having transferred into OSU. As more students transfer into OSU, the retention rate for this population has remained consistent the last 5 years, 81.8% of our Junior standing transfer students are retained the following year. While OSU does have a dedicated staff member who centers transfer students in their work, more comprehensive support systems are needed in order to help this student population be successful. State funding would allow OSU to expand critical support for transfer students, including the creation of a transfer student center that will focus on helping transfer students to acclimate to OSU culture, foster connections and community, and empower them to reach their educational goals.

Experiential learning for underrepresented student populations: Experiential learning opportunities such as internships and undergraduate research opportunities are considered [“high-impact” practices](#) according to the American Association of Colleges and Universities; this means that experiential learning not only impacts post-graduation prospects but may also help students stay in college and increase their engagement in school. Currently, about 50% of OSU students participate in experiential learning; our goal is that 100% of students participate in experiential learning. In order to make these opportunities more accessible to low income and first generation students, it is important to offer and help them locate paid opportunities. Programs like the PROMISE Internship Program at OSU, which guides students through the application process, support students through their internship experience, and ensure that students receive compensation, can help reduce these barriers. Funding would allow us to support a program like this with adequate staffing and to expand the scope to encompass a wider array of experiential learning opportunities.

Advancement

Beyond OSU (re-envisioning Career Development): Beyond OSU is a university-wide approach to career development at OSU wherein career readiness and development are intentionally built into the student experience. There is evidence showing how career learning can greatly influence retention among low-income students and we know when students create career-related goals they are more likely to make positive persistence decisions than students who report having no job-related goals. By integrating career into the curricular and co-curricular experience, we ensure that all students, regardless of race or socio-economic status, are prepared to pursue meaningful work upon graduation and beyond. Through career preparation and experiences, all students will develop career ready skills and gain connections to help them achieve their goals. This student-centric design allows for every student to receive: co-curricular activities that help connect to potential careers, tailored career support in their field, preparation through career relevant curriculum, and connection to employers and alumni in the fields/industries they desire. A state investment would allow this vision for career development at OSU to come to fruition and to be sustained for the future.



University of Oregon Priorities for the Equity Investment Framework

GETTING IN (COLLEGE TRANSITION PROGRAMS)

FIRST YEAR TRANSITION PROGRAMS

Summer Bridge – Division of Undergraduate Education and Student Success

UO received \$1,100,000 (Geer Funding and GF Funding) for summer bridge programming and corresponding support during the academic year for students who were adversely impacted by the pandemic. Awarded funds support students during the 2021-2022 and 2022-2023 academic years through two primary initiatives: 1) Early Move-In Summer Bridge Programs, and 2) First-Year Transitional Support. UO's efforts focus on first-year student transition for low-income, first-generation and students of color. The program enrolled 296 students in 2021. While we are in early stages to fully understand the long-term impact of this program, majority of the participants reported positive impacts on their successful transition to college and all participants are still actively enrolled at the UO.

STAYING AND PERSISTING

WRAP AROUND SERVICES

Located in Oregon Hall at UO campus, the wraparound programs provide coordinated and holistic support for students aiming to reduce the challenges of navigating support resources traditionally spread across the institution. The services often include comprehensive advising support (academic, financial, personal), academic support (tutoring, coaching, skills courses), community building programming (mentoring, orientation, and workshops) and proactive and continuous outreach and connection (check ins, and timely nudges).

Center for Multicultural Academic Excellence – Division of Equity and Inclusion and Division of Undergraduate Education and Student Success

Since the 1980s, CMAE, originally known as the Council for Minority Education (CME), then Office of Multicultural Affairs (OMA), has served underrepresented students at the UO. CME/CMAE worked with recipients of the Underrepresented Minorities Achievement Scholarship (UMAS – now the DES), a scholarship created by the Oregon State System of Higher Education (OSSHE) in 1987 to increase the enrollment of URM students across the state's four-year public colleges and universities. CMAE's mission is to promote student retention, persistence and academic excellence for historically underrepresented and underserved populations through programs and services such as advising, tutoring support, cohort-based writing classes, and resource lending library. CMAE has four student multicultural academic counselors who advise underrepresented and underserved populations, undocumented and tuition equity students, serve as retention specialists, complete target outreach and programming for ADPI, Black/African American, Latine/x and Native and Indigenous students. CMAE also supports UO's Diversity Excellence Scholarship (DES) students. DES is awarded to



about 350 academically qualified students each year who demonstrated their contribution to equity and inclusion in their communities or campus. In addition to the financial support, DES students receive wraparound support from CMAE advisors. In 2020, 87.3% of first-time full-time DES students persisted to second year compared to 84.1% of full-time first-time non-DES peers. 75.3% of FTF DES students graduated in four years in 2020 compared to 60.9% of non-DES peers. While CMAE's demonstrated impact on underrepresented students' success and increased number of students who benefit from CMAE's support, the center has not grown in size since its early development. The primary priority for our institutional investment would be to focus efforts in CMAE in order to expand capacity and wraparound support for underrepresented students.

Accessibility Education Center - Division of Undergraduate Education and Student Success

The Accessible Education Center provides disability services and accommodations support to UO students and promotes universal and inclusive design to UO community. Five full time access advisors facilitate students' accommodations process and support. The number of students who experience disability has exponentially increased over the past years and approximately 10% of undergraduate students are registered with AEC. This is an area of growth for the institution to adequately support students with disabilities for their success and add transition for post-graduation career readiness skills.

Intercultural Mentoring Program Advancing Community Ties (IMPACT) - Student Life

The Multicultural Education, Engagement, and Student Success program is a place that helps connect students of all races and backgrounds to collaborate around cultural programming and education and create a stronger community. The office leads IMPACT, a peer-to-peer mentoring program for students of color and first-generation college students. IMPACT student coordinators support first-year and transfer students with their transition to the UO. The student coordinator team develop topics and presentations that encourage intentional conversation and support the IMPACT cohort. Each family group help participants navigate the first year of college by connecting with campus resources, providing information about classes and majors, and building connections with cultural organizations with support systems. Getting connected as a family group also includes social excursion opportunities such as going to play laser tag, cooking dinner together, or working within study groups. The program is supported by a partial professional FTE and student staff.

SAFE SPACES WITH SUPPORT PROGRAMS AND ADVOCACY

With increased number of students with intersectional identities, a multi-purposed building dedicated to underrepresented students and their support programs and resources would be an asset to the institution. An inclusive large center that would complement current cultural centers like the Black Cultural Center, Many Nations Longhouse, and the limited space within the Multicultural Center), could create a physical home for underrepresented students to congregate, build community and sense of belonging. The space could also house wraparound services, support and advocacy programs where students are supported.



Dreamers Workgroup

Dreamers Working Group is consisted of dedicated members including faculty from academic departments across campus. The workgroup fosters the unique gifts and talents of Dreamer students at the UO and to promote their sense of belonging and safety, as they pursue their higher education goals. They use the term “Dreamers” to refer to Undocumented, DACAmented, Tuition Equity, and students of mixed status families. Since the spring of 2019, \$177,300 in Dreamer scholarships have been awarded to 18 Dreamer and undocumented students who are ineligible to apply for Federal aid, including \$54,000 for the 2021-2022 academic year. This program only has a .50 administrative support and staff volunteers.

Nontraditional and Veteran Student Engagement and Success

A dedicated staff member serves both nontraditional students and veterans. Nontraditional students may be 25 or older when beginning or continuing their first undergraduate degree; married, partnered, divorced, or widowed; a parent or caregiver of a family member; returning to college after a break or career change; a student veteran or on active duty in the military; and may be working full-time or close to full time. Student veterans in particular are a population that has required a great deal of support in transitioning to the university community. Nontraditional aged students represent 5% of the undergraduate population. 14.4% of Nontraditional aged students identify as an underrepresented minority. 67.7% of Nontraditional aged students are Pell eligible and 38.5% are First Gen. With an added position, these two critical populations can have dedicated support to expand services.

GETTING OUT

EQUITABLE CAREER OUTCOMES

DucksRISE

Launching in spring 2022, DucksRISE (Research, Internship, and Student Engagement) grant-funded program (with one year additional institutional match) focused on equitable career outcomes for underserved students, centering Pell-eligible and underrepresented minority populations. Through an integrated approach to continued academic preparation and career readiness embedded into the core of the student experience, both in and out of the classroom at an R1 research university, the cohorts will participate in a course and associated co-curricular workshops and professional development opportunities intended to build community and foster a sense of belonging while developing career skills and NACE (National Association of Colleges and Employers) competencies. The core of the DucksRISE program will culminate with placement in three-month career readiness mentorship experiences (e.g. internships, externships, research/creative work experiences) to expand professional and industry networks; bridge the connection between undergraduate research and career exploration; and gain the tools to be competitive in post-graduation opportunities. The program is supported by a one-year Strada Education Network Beyond Completion Challenge Grant. Permanent and increased funding could rapidly expand our students post graduation career outcomes.

Equity Investment Framework

Oregon's Rural University

Eastern Oregon University serves the largest percentage of Pell-eligible students of in the state. Many of these students, both traditional and adult learners, are in underserved rural and frontier regions of the state where access to education and social support services are extremely limited.

Dramatic shifts in regional demographics sees an increase in need for increased services for all students from diverse backgrounds, orientations, ages, and abilities, to ensure their success in gaining an education to guarantee their futures.

Along with serving rural students both on campus and online, EOU is on the path to becoming Oregon's first Asian American and Native American Pacific Islander Serving Institution (AANAPISI), due in part to the long-term partnerships EOU has with numerous nations in the pacific islands.

These draft proposals outline key investments in EOU's diversity, equity, inclusion and belonging efforts.

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EOU Equity Investments 3.2.2022

Better outcomes for students

Putting student needs first

The proposed investments in equity programs are focused on increasing student retention and success before, during and after attending EOU through direct supports in existing university services and effective new practices.



Pre-college engagement

Connecting with students throughout the K-12 system is critical in helping them understand and actively participate in plans for post-secondary opportunities.

- Diverse student outreach coordinators in rural and frontier school districts
- Summer bridge programs to assist students in preparation for college
- Dual-credit programs for students to gain credit for classes they are already taking in high school and ensure those credits expedite degree completion
- Early College Initiatives resources to develop collaborations with schools

Current student success

Key investments are needed to enable the retention and persistence of underserved students throughout their college experience.

- Increase student peer mentorship programs to connect experienced and new students to ensure they have a positive experience and the advocacy they need to be successful
- Increase multicultural staffing in EOU Center for Student Diversity and Inclusion
- Expand funding to host area and regional cultural and diversity-based community events and gatherings at the university
- Invest in teacher prep and other pre-professional programs such as EOU's Oregon Teacher Pathways and Center for Culturally Responsive Practices
- Resources to develop diversity in existing curriculum and pedagogical practices
- Community outreach and engagement staff with EOU Diversity, Equity, Inclusion and Belonging office to liaison with local and regional communities
- Supports to recognize and reward programs and employees that engage in diversity initiatives to impact student achievement

Graduation and career readiness

Preparing students for life after gaining their degree is critical in developing a lifetime of success.

- Resources to support scholarships for internship and experiential learning opportunities for diverse and underserved students
- Career services support in preparing for the job market or graduate school



Access, Retention, and Career Readiness Programs for Underrepresented Students at Portland State University | Equity Investment Framework

Background: As of Fall 2021, **18,045** undergraduate students were enrolled at Portland State University. **48%** of the student body are BIPOC (Black, Indigenous, People of Color), **46%** are first-generation college students and **79%** are Oregon residents. In Fall 2020, PSU welcomed its first majority BIPOC class and a majority first-year BIPOC faculty cohort. PSU's long-standing focus on equitable student success is evident through our access, retention, and career readiness programs campus wide.

Central to our approach in supporting underrepresented students is recognizing students' lived experiences from an asset-based lens and providing holistic support programs that address the hidden curriculum (the unspoken or implicit values, behaviors, procedures, and norms that exist in an educational setting) pervasive in presenting barriers to accessing college, staying enrolled in school, and pursuing meaningful career pathways. Below are our recommendations for the Equity Investment Framework.

I. Develop culturally relevant outreach and access programs to encourage college enrollment | Demystify the hidden curriculum of college access and admissions through early college exposure, family engagement, and strategic partnerships.

PSU's competitor analysis suggests that of our Fall 2020 admits, 19% of first-year students and 43% of transfer students did not enroll in college. To increase access to higher education and prepare Oregon students for success, there's a need to develop culturally relevant outreach and access programs through family engagement and strategic K-12 education and community partnerships, with special attention to the growing diversity of the state. The 2020 US census shows Oregon's population becoming more diverse with a 37.6% growth in Asian Americans, 21% growth in African Americans, and 30.8% growth in Hispanic and Latin American populations.

Further, data collected by the [College Attainment Network](#), shows that 47% of Oregon's class of 2021 high school graduates did not complete the FAFSA, with 41.4% of those students being Pell-eligible FAFSA applicants. The state of Oregon left ~\$33,270,352 of total Pell grant dollars on the table by the class of 2021. FAFSA completion is strongly associated with immediate postsecondary enrollment, and it's demonstrated that if states can improve FAFSA completion rates that students will benefit.

Expansion of culturally relevant outreach and access programs that dispel financial aid hurdles and navigating college applications will help to ensure more Oregonians are set on the path to greater social mobility. Activities of these programs include: early outreach middle and high school programs, matching counselors with partner districts and community based organizations and providing multilingual, topic-based programming to bridge the college knowledge gap and increase cultural capital, such as navigating complicated multi step process in completing college prep coursework, navigating the financial aid process, addressing financial literacy, social and emotional well-being, and college preparation success.

It also includes the expansion of promising programs such as the grant funded Knowledge for Freedom initiative, which provides opportunities for underserved high school seniors from Portland to participate in a seminar and civic engagement program, exposing secondary students to campus life early and supporting a seamless transition to entry to college by providing wrap around support for college applications and navigating the FAFSA.

II. Improve support for underrepresented students by increasing support for minoritized faculty and staff | Demystify college success through improving representation.

According to PSU institutional data, one-year retention rates for the Fall 2020 cohort demonstrate equity gaps for Black (-1.8%), Native American (-23.1%), Hispanic (-0.4%), Pacific Islander (-8.6%), and Multi-racial students (-3.6%). Inequity also exists when looking at six-year graduation rates, with Black (-10.0%), Hispanic (-1.6%), Multi-Racial (-2.5%), and Native American (-14.3%) students experiencing equity gaps. Addressing these equity gaps are made possible by the intentional recruitment, hiring, and retention of minoritized staff and faculty who play a key role in providing culturally relevant retention services, culturally affirming pedagogy, and providing identity-based spaces where students find community and cultivate a sense of belonging.

Support for minoritized faculty and staff include: 1) expanding PSU's inaugural leadership academy for underrepresented staff and faculty, connecting high potential leaders with underrepresented identities with leadership training meant to address the cognitive and socio-cognitive needs of professional development; 2) financial investments to support the ongoing professional development of faculty and staff.

In addition, there's a need to expand wrap-around support to consider additional areas of opportunity, such as addressing the need to increase support for men of color on college campuses, and to other identity groups such as students who identify from the Middle East, North African, South Asian diaspora. Funding is needed to hire staff to expand holistic advising, peer mentoring and engagement, and financial support.

III. Develop underrepresented students' leadership and professional development capacity and expand resources for high impact career preparation programs | Demystify the workplace and career.

Research increasingly suggests that even with a college degree, graduates who are first-generation¹, women, and BIPOC² are not experiencing the same economic benefits as their peers who have college educated parents or are not underrepresented. Factors that influence these disparities include opportunity gaps in accessing career preparation programs, internships, and other high impact experiences which provide students with mentorship, sponsorship, and career competency building opportunities. In addition, underrepresented students need support in attaining the cultural capital necessary to navigate their first job and preparation for their first promotion.

Activities to support these efforts include funding staff for dedicated professionals to cultivate the development of a leadership academy and/or a transition class for underrepresented students in their last year of college. This leadership academy or course will include both the transactional and transformational know-how required to navigate the hidden curriculum of career preparation, selection, salary negotiation, impostor syndrome, being the only underrepresented person in the workplace, and iterative professional development required to advance in their career. The curriculum of the leadership academy will be developed from an equity lens, recognizing the challenges that underrepresented students might face in varying industries.

Further, career preparation programs in industries which warrant additional diversity and demonstrate exponential outcomes for the public good and the vitality of the state of Oregon should be provided expanded resources to serve and support more students. For example, career preparation programs which support the growth of diversity in Oregon's traded sector involve industries such as professional, scientific and technical services, public administration, education, health care, finance and insurance, and more. Research conducted by the [Value of Jobs Coalition](#) indicates that growth in the traded sector is a critical part of the growth of the region's economy as traded sector employees earn significantly higher wages. Diversifying the traded sector workforce translates to economic mobility for underrepresented communities. Other areas of impact for career preparation include addressing climate action and supporting diversity growth in green job creation, as well as high-value industries with significant underrepresentation such as healthcare and law.

¹ [First-Generation College Graduates Lag Behind the Peers on Key Economic Outcomes. Pew Research Center \(2021\).](#)

² Exploring Equitable Postsecondary Value. [Value Framework Data Tool.](#)

Programs at PSU which help support the need for an Equity Investment Framework

Pre-College/Access

TRIO Educational Talent Search and Upward Bound - TRIO ETS and UB are federally funded pre-college/access programs which support ~800 first-generation, low-income, and/or students with disabilities. Upward Bound supports students to improve study skills and academic plans in high school, develop their career, and education plans, and help to succeed in higher education. Talent Search is an educational access and information program that assists students in learning about careers and college majors.

Oregon MESA - Oregon MESA serves more than 600 middle and high school students who are historically underrepresented in STEM fields. The foundation of Oregon MESA is to provide a school-based invention education program — the only adaptable, prototype-driven math, engineering, and science program for traditionally underrepresented students that takes an ecosystem approach to education.

Retention

Multicultural Retention Services: The mission of MRS is to ensure the academic success, retention and graduation of first-generation, low income students from historically underserved backgrounds. MRS strives to empower and inspire students by providing academic support, advising, mentorship, advocacy, and leadership development. MRS services and programming build a sense of community and belonging essential to successfully navigate Portland State University. MRS offers four first-year retention programs to incoming PSU students. Each program is uniquely designed to connect students with a diverse community at PSU and focuses on the college experience of a specific cultural community.

Cultural Resource Centers: The Cultural Resource Centers at PSU include the Multicultural Student Center, the Pan-African Commons, the Pacific Islander, Asian & Asian American Student Center, La Casa Latina Student Center, the Native American Student and Community Center, the Middle Eastern, North Africa, South Asia Student Center, and soon to come- a Dreamer Resource Center.

ATMOS program: The ATMOS program within the School of Business at PSU supports diverse and underrepresented undergraduate business students of color and is a promise of academic, career and community support to help create an avenue for a brighter future. Participants in the ATMOS program have a 97.1% retention/graduation rate and each student receives tailored career support and are connected to opportunities in the business community. To date, ATMOS has served 125 underrepresented students.

Career Preparation Programs:

Explore the Law: Student Legal Services hosts the Explore the Law (ETL) program, a career exploration opportunity founded in 2012 that pairs students with attorney mentors and community learning sessions to help students prepare for law school and careers in the legal field. In this current cohort, 50% of ETL students are BIPOC, first-generation college students, 40% speak English as a second language, and 41% come from households with an income level less than \$25,000. To date, ETL has prepared 350 pre-law students.

IGNITE: Ignite is a leadership and mentorship program for diverse, low-income, and first-generation PSU pre-health students in pursuit of clinical healthcare careers. Ignite provides social, career, and academic-oriented support while reducing financial barriers (through a \$5000 scholarship) to increase time students have available for activities to increase their success. 78% of student participants identify as BIPOC.

LSAMP: The LSAMP-ISS Climate Resilience Internship program is an innovative pilot program launched in AY 2021 to provide LSAMP (Louis Stokes Alliance for Minority Participation) students with opportunities for professional development and skill growth that advances their career readiness and post-graduation goals. LSAMP students are historically excluded undergraduate students majoring in STEM disciplines. The Climate Resilience Internship program provides 2-3 academic term paid internships in the climate change and climate/disaster resilience areas. The pilot LSAMP-ISS Climate Resilience Internship program is currently supporting 12 underrepresented students during AY 2021-2022.



Investing in Equity at Southern Oregon University

March 2022

Southern Oregon University (SOU) provides a range of programming and services designed to support underrepresented student college access, persistence, and degree attainment. This document describes 1) the three current demonstrably successful programs in each of these areas; 2) the challenge presented in maintaining these programs; and 3) considerations for how additional funding could be used to support and enhance program success by creating formal structures between them that center the experience of the populations they are designed to serve.

Current Programming

The following SOU programs operate separately from one another, though with significant overlap in the populations served.

- ◇ Pre-College Youth Programs;
- ◇ The Bridge Program at SOU; and
- ◇ Success at Southern/Trio Student Support Services

[Pre-College Youth Programs](#) offers enriching and dynamic educational programs to K-12 students in southern Oregon. Programs include summer camps, enrichment classes and workshops, regional academic competitions, and early college credit programs for high school students. The program has a strong focus on underrepresented populations and to that end, prioritizes high-quality, affordable programming, including those specifically designed for Latino/a/x and Native learners. While the Alameda/Oberlin fires and COVID-19 impacted attendance, the program continues to draw participants, ending the 2020-21 academic year with a positive fund balance for the program and robust engagement following program administrator outreach to affected youth and families. On average, program participants become SOU matriculants at the following rates: Latino/a/x programs – Academic Latina 22%; Pirates to Raiders 26%; Early College Credit 30%.

The [Bridge Program at SOU](#) (Bridge) mission is to increase the academic achievement, persistence and graduation rates of underrepresented students first-year experience helps promising students transition to college by supporting their social, emotional, and academic strengths. Bridge focuses on Oregon helping underrepresented Oregon students thrive in their first year of college. With Strong Start grant funding, the program expanded in the 2021-22 academic year to support new students whose experienced adverse learning outcomes as a result of COVID, Strong Start funding from the State of Oregon allowed SOU to expand the program to link. SOU received 117 applications for the 2021-22 academic year and accepted 97 students of which 75 enrolled, including seven American Samoan students and six non-binary students.

Through Title IV funding, [Success at Southern \(SAS\)/Trio Student Support Services \(SSS Program\)](#) (Trio) serves students who meet eligibility for Federal Student Financial Assistance (grants, work-study and or loans) and have a need for academic support in order to successfully pursue a postsecondary educational program. Trio participants must also be first-generation college students, meet low-income eligibility criteria, or have a documented disability. Trio far exceeds approval rate eligibility requirements for participation in the federal program year-to-year, with particularly notable success in meeting academic standing and graduation rate for program participants. Trio's funding supports a maximum of 190 students in the provision of tutoring, academic and financial advising, scholarship classes and workshops, and guidance on applying for admission to graduate programs. In the 2020-21 academic year, 20% of Trio's participants were Latino/a/x, 12% were American Indian/Alaskan Native, and 7% African-American.

In addition, SOU's [PEAK](#) program (Professional Experience, Achievement, and Knowledge) is designed to provide students with on-campus employment opportunities that encourage rich relationships with faculty and staff, foster professional curiosity and competency, and engender a sense of substantive contribution to the SOU community. Current program data shows low levels of participation among underrepresented students but also some success among students placed in accordance with the program's intentions.

The Challenge

Supportive programming like Bridge, Trio, and Pre-College Youth Programs de-mystify the educational experience for historically underrepresented students and their families, from pre-college to degree attainment – necessary because academe does not generally center the experiences of racially minoritized, low-income, and/or first-generation populations. However, these same wrap-around services and programming, even when successfully created and executed, can become siloed, relegated to “add-on” status, and significantly challenged in maintaining funding to meet the needs of the students served—a population growing in size, with needs that have increased over the last ten years, and that show few signs of decline.

In addition to research data supporting the value and effectiveness of wrap-around programming and services, research data also supports the value of exposure to and engagement in professional contexts in structured, undergraduate programming. Data shows first-generation professionals cite such experiences as a highlight of their academic careers and *chief among the reasons for their success*. Such success serves not only the individual student, but also supports a rise in socioeconomic level for a family, increasing the likelihood of the same for the generation that will follow it.

Formal Connections

Currently, the wrap-around services and programs described in this document experience an overlap in populations served but no formal ties between their operation. While there is evidence to show programs like PEAK successfully support both persistence toward attainment and professional success beyond it for underrepresented populations, SOU's program at its current

usage is not optimized to support these populations. Additional funding would allow SOU to support these programs and leverage them for greater effectiveness by formalizing ties between them, and creating the structures to sustain them to support access, enrollment, attainment, and professional success.

Currently envisioned is a structure that formalizes and supports connection among Pre-College and Youth Programs, Bridge and SAS/Trio, and PEAK. Additional funding could be used to strengthen and grow the individual programs. Concurrently, we would analyze the data of the programs' shared populations~ identifying the range of informal, organic connections between them that support student persistence and attainment, and develop the infrastructure necessary to maximize the benefits of the connections by formalizing and sustaining them in a way that supports students both during and after their academic experiences.

WOU Diversity-focused Proposed Investments

Western Oregon University (WOU) is poised to become the first public university in the Pacific Northwest to earn the Hispanic Serving Institution designation. The Education Trust recognized WOU as one a select group of universities that had erased the racial achievement gap.

The proposed activities would support expansion of campus student services that have been proven to be effective and the creation of needed new services that are considered best practices nationally.



Current WOU students Success

Goal: Improve the first-to-second year retention and graduation rates of BIPOC and diverse students at WOU so that underrepresented students have the same or higher retention and graduation rates as WOU's highest achieving ethnic group (Latinx students).

Expand current programs

- Multicultural Student Services and Programs (double the number of students served)
- Teacher Preparation Student Support Program (increase number students served by 200)
- Provide additional funds to support re-engagement and completion grants with a focus on students from under-served communities (Serve 500 students annually)
- Expand the support for Executive Director of Diversity, Equity, and Inclusion
- Enhance faculty and staff diversity training (Serve the entire campus community)

New Initiatives

- First Generation Center (Students served: 4,000+)
- Gender Justice Center (LGBTQ+ and other students served: 2,000)
- DACA Student Success Center (Students served: 200+)
- Pool to recruit and retain faculty and staff from diverse backgrounds (faculty and staff served annually: 200)

Career Readiness

Goals: Increase the graduation rates of all students and improve preparation for career or graduate school entry.

Expand current programs

Expand Career Services and Service Learning (students served: 2,000)

New Initiatives

Paid Internship fund with a focus on teacher education, criminal justice (students served: 4,000)

Pre-collegiate Activities

Goal: Increase the number of BIPOC and diverse students who are prepared to attend college.

Expand current programs

- Expand the Latino Advisory Board to serve school districts outside of Marion County
- Expand the WOU Project to other Willamette Valley High Schools and the coast
- Expand Bilingual and Diverse Teacher Scholars Program

New initiatives

- Coordinator of Pre-collegiate Programs
- Bilingual and Diverse Health Professions Program



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