

OREGON HIGHER EDUCATION

# Strategic Plan 2016 - 2020

HIGHER EDUCATION COORDINATING COMMISSION | Spring 2016





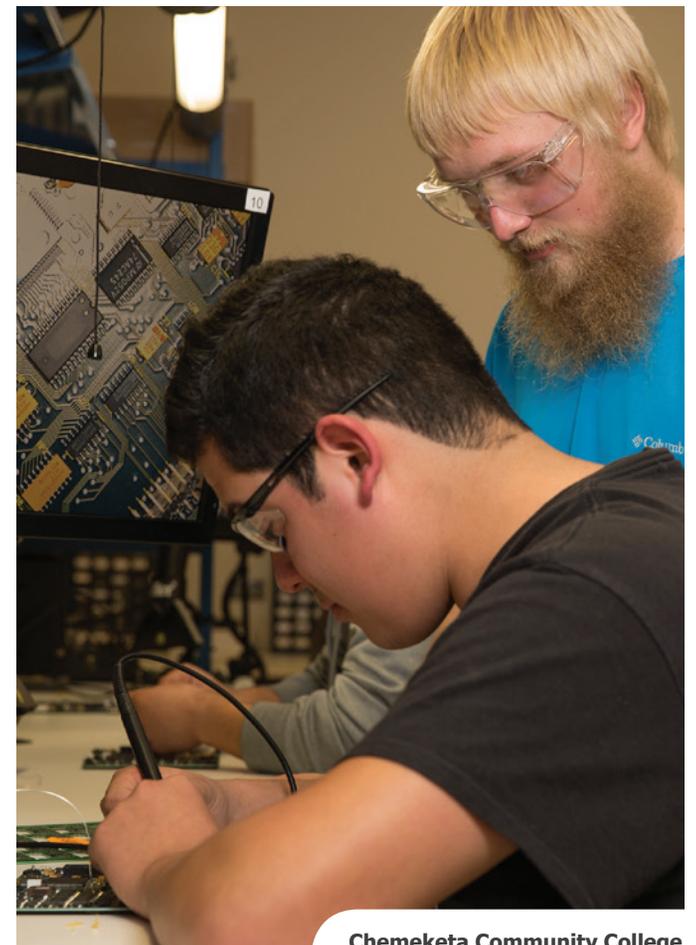
University of Oregon



Portland State University



Southwest Oregon Community College



Chemeketa Community College

## Higher Education Coordinating Commission

The HECC is a volunteer, Governor-appointed public commission responsible for setting higher education policy in conjunction with the Oregon Legislature and the Governor. Members are appointed for four-year (voting) or two-year (non-voting) terms.

### **2016 members include:**

Neil Bryant, Chair  
David Rives, Vice Chair  
Betty Duvall  
Terry Cross  
Ramon Ramirez  
Larry Roper  
Carmen Rubio  
Duncan Wyse  
Lee Ayers-Preboski (University faculty, non-voting)  
Rob Fullmer (College/University staff, non-voting)  
Frank Goulard (Community College faculty, non-voting)  
Claire McMorris (Student, non-voting)

### **2014-15 members who were instrumental in the development of this strategic plan:**

Tim Nesbitt  
Kirby Dyess  
Lamar Wise  
Anayeli Jimenez

### **Executive Director:**

Ben Cannon

### **Questions or comments about this plan, or the HECC:**

Info.hecc@state.or.us  
503-378-5690  
775 Court Street NE  
Salem OR 97301-3827



The Higher Education Coordinating Commission is the State of Oregon's sole board and agency responsible for ensuring pathways to educational success from the point at which students are completing their formal high school experience and moving forward to learning, training and mastering skills in college and career training programs.

Originally chartered as a state commission by the Legislature in 2011, this body was given expanded authorities in 2013 to include both a commission and a state agency that supports and implements the commission's vision.

In creating the HECC, the Legislature consolidated state-level leadership and coordination for post-secondary education, which had been previously spread across several boards and positions.

The HECC's statutory charter outlines three primary aspirations for Oregon higher education, including: (1) improving educational attainment and completion, (2) improving Oregon's economic competitiveness and quality of life; and (3) ensuring that resident students have affordable access to colleges and universities.

The HECC is generally responsible for advising on, adopting, and implementing state policies to ensure that the network of colleges, universities, workforce development initiatives and pre-college outreach programs remain well coordinated and student-friendly.

To effectively exercise its powers, duties, and functions, the HECC works in close partnership with the governing boards, administrators, faculty, and students at the institutions it serves—playing a critical convening role for Oregon higher education and the communities it affects.

## MAJOR POWERS, DUTIES, AND FUNCTIONS OF THE HECC

### Providing one strategic vision for higher education in Oregon:

- Developing state goals for the postsecondary system, including community colleges, public universities, and student access programs **(ORS 350.075)**;
- Adopting a strategic plan for achieving the state's postsecondary goals **(ORS 350.075)**;

### Making budgetary recommendations for state institutions and programs:

- Developing a comprehensive higher education budget request linked to the strategic plan **(ORS 350.075)**;
- Recommending a consolidated higher education budget request to the Governor and the Chief Education Officer **(ORS 350.075)**;
- Developing the biennial budget request for community colleges and public universities, and allocating legislatively approved resources **(ORS 341.626, 350.075, 350.090, 350.095, 352.089)**;
- Approving resident tuition increases greater than 5% for public universities **(ORS 352.102)**;

### Authorizing programs and degrees:

- Approving mission statements and significant changes in academic programs for public universities **(ORS 350.085, 352.089)**;
- Approving new community colleges' certificate and degree programs **(ORS 341.465, ORS 350.075)**;
- Authorizing degrees for some private and out-of-state schools, **(ORS 348.594 to 348.615)**;
- Managing licensure and teacher registration for private career schools **(ORS 345.010 to 345.450, 341.440, 342.197, 348.070, 687.011)**;

### Managing key programs in Oregon:

- In conjunction with the Oregon Workforce Investment Board and the Oregon Employment Department, managing state implementation of the federal Workforce Innovation and Opportunity Act **(WIOA)**;
- Administering the Oregon Opportunity Grant and other student success programs through the Office of Student Access and Completion **(ORS 348)**;
- Developing dual credit standards, transfer standards, and credit for prior learning standards **(ORS 340.310, 341.430, and 350.110)**.

### Evaluating success of efforts:

- Conducting data collection, analysis, research, and reporting across all sectors of higher education **(ORS 350.075)**;
- Conducting annual institutional evaluations for public universities, **(ORS 352.061)**.



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# Vision Statement

The Higher Education Coordinating Commission (HECC) is dedicated to fostering and sustaining high quality, rewarding pathways to opportunity and success for all Oregonians through an accessible, affordable and coordinated network for educational achievement beyond high school.

# Executive Summary

Higher education in Oregon is a complex network of private and public career schools, colleges, and universities that collectively awards more than 45,000 degrees and certificates a year.

The State of Oregon’s HECC is the sole board and agency responsible for ensuring pathways to educational success and serves as a convener of the groups and institutions working across the higher education arena.

The HECC’s 2016-2020 Strategic Plan, adopted on February 11,2016, fulfills the Commission’s obligation under ORS 350.075 to “adopt a strategic plan for achieving state postsecondary education goals” and is centered on addressing the three primary pillars of the HECC’s statutory charter:

- Improving educational attainment and completion;
- Improving Oregon’s economic competitiveness and quality of life of its residents; and
- Ensuring resident students have affordable access to colleges and universities

Additionally, it builds on the Commission’s [first Strategic Plan \(2014-15\)](#), which described a set of short-term action steps that reflected the Commission’s understanding of the ways it is responsible for “steering” and “cheering” Oregon towards its higher education goals. And, it is anchored by the Commission’s [Equity Lens](#), which commits the HECC to ensuring its policy and resource allocation decisions advance equity.



Southwest Oregon Community College

The purpose of this plan is to outline broad strategies that will help guide the Commission and its staff in developing specific work plans, budget recommendations and policies between 2016 and 2020.

The HECC will pursue these strategies in partnership with institutions, community-based organizations, and with students and their families who are interested in or participate in the state’s higher education system. This plan will be revisited and updated, as needed, on an annual basis.

## Status Report: Oregon's Higher Education Goals and Our Progress Towards Them

In 2011, the State of Oregon enacted legislation that created an aspirational goal for Oregon's educational achievement that seeks to have at least 40% of Oregon's working age population (aged 25-64) hold a bachelor's degree or higher, 40% to hold an associate degree or certificate, and 20% percent to hold a high school diploma or equivalent by 2025.

Known as the 40-40-20 Goal, it establishes a clear target—a "North Star" aligned with Oregonians' economic, civic, and social aspirations—against which to gauge the state's educational progress.

While Oregon has considerable work to do to achieve 40-40-20, the overall trend is positive. Between 2006 and 2013, the percentage of working-age Oregonians with associate degrees or certificates edged upward from 38% to almost 41%.

Yet, the improvements in educational attainment and the benefits they impart have not been seen equally by all groups. Data points to the fact that students in Oregon's education pipeline (pre-kindergarten-12 system), especially low-income and students of color, are not accessing and succeeding in higher education at equitable rates.

As Oregon works toward 40-40-20, the HECC will continue to take a lead role in convening partners to further align programming and supports to close the achievement and opportunity gaps for low-income students, students of color, and recent high school graduates. HECC will also deepen connections between Oregon's education and workforce systems.

### The Six Strategies:

The six strategies outlined in this plan leverage the HECC's role as a convener and its ability to forge partnerships across higher education institutions and organizations that work within the pre-kindergarten to career pipeline.

The strategies address needs for both future students in Oregon's education pipeline and adult learners who may benefit from additional education or credentials.

The strategies aim to bring about:

- **Far-reaching impact** by sharpening Oregon's higher education goals and orienting investments to maximize the economic and community impact of postsecondary education;
- **Institutional level improvements** by developing a funding model that links state funding inputs to student achievement outcomes, and provides simplified, better aligned pathways and structures between institutions to improve student entry, navigation and completion; and
- **Student-focused change** that provides additional supports to aid student completion—not just entry into Oregon's education system—and is focused on providing the most affordable, high quality education options.

### Strategy 1: Goal-setting

Building on the state's 40-40-20 goal, the HECC seeks to sharpen Oregon's higher education goals and better describe the state's progress in meeting them. This includes:

- Working with partners to develop a new adult educational attainment goal, distinct from 40-40-20, that reflects the actual and projected labor market demands and employment opportunities.
- Developing actionable interim 40-40-20 targets for overall student cohorts and underrepresented student populations to ensure that all groups reach 40-40-20 in the same timeframe.
- Conducting public reporting on higher education outcomes, in aggregate and by institution, in a more systematic way and with an equity focus.
- Improving state and institutional capacity for collecting, analyzing, and reporting on student data.

## **Strategy 2: Public College and University Funding**

As the sole entity responsible for proposing a comprehensive higher education budget to the Governor and Legislature, the HECC will develop a budgeting model linking state funding inputs to student achievement, and the HECC will work with partners to advocate for funding levels required to meet state goals.

## **Strategy 3: Pathways**

The HECC will support the pre-K to career pipeline by working with partners to simplify and align systems and structures for student entry, navigation, completion, and exit/re-entry to career. Key elements include:

- Supporting colleges and universities to foster deeper partnerships with school districts and community or regional organizations to improve pre-K-12 outcomes;
- Improving the alignment of learning standards and outcomes between high school and higher education, between higher education institutions themselves, and between higher education and career.
- Promoting degree pathways and related initiatives that increase opportunities for postsecondary students to build on career-oriented education and workplace experience.
- Create better connections between higher education and training and employer needs.

## **Strategy 4: Student Support**

The HECC will work to strengthen the ability of campuses and communities to support student safety, success, and completion by:

- Using funding models to incentivize institutions to invest in student safety and success;
- Considering the creation of a strategic fund that can be used to support statewide, collaborative, university-led initiatives focused on improving student success;

- Working with the Legislature and partners to ensure that funding proposals focused on access and affordability are complemented by funding dedicated to student success;
- In partnership with institutions, supporting the development of center(s) to research, develop, and disseminate best practices for student safety and success; and
- Engaging students, families, and community groups as partners in efforts to improve student success.

## **Strategy 5: Affordability**

The HECC seeks to limit student and family cost for all, with a particular focus on ensuring that students rising through Oregon's pre-K-12 school system may be reasonably certain that they will have access to affordable options for higher education. Key elements of this strategy include:

- Developing a set of affordability measures that can be used to guide policy and to measure progress and reporting annually on progress/status;
- Supporting innovations that lower student and family cost while maintaining or increasing quality;
- Increasing state financial aid to the national average per student;
- Continuing to promote Oregonians' access to the state and federal financial aid system, including through FAFSA and ORSAA completion efforts; and
- Connecting young Oregonians to the promise of affordable higher education.

## **Strategy 6: Economic and Community Impact**

The HECC will work with partners and the communities they serve to maximize the impact of postsecondary education on Oregonians' economic, civic, cultural, and personal well-being. This includes:

- Developing a structure to prioritize and promote university-led research with tools such as funding-based incentives.

- Collaborating with partners in Oregon’s workforce system to develop metrics to focus investments in the workforce system.
- Making investments that support higher education’s unique role in promoting the cultural, economic and civic vitality of Oregon.

Together, these strategies provide a structure with which the HECC will work within to activate key levers in Oregon’s higher education and workforce systems. The strategies do not, however, provide a comprehensive list of efforts that the HECC and its offices will undertake over the next five years. As progress is made and necessary adjustments are identified, the HECC will work with its partners to make updates to this plan and its strategies.



Chemeketa Community College

## THE UNIQUE ROLE OF THE HECC

The State of Oregon’s Higher Education Coordinating Commission is the sole board and agency responsible for ensuring pathways to educational success and serves as a convener of the groups and institutions working across the higher education arena.

It is responsible for advising on, adopting, and implementing state policies to ensure that this network remains well-coordinated and student-friendly—while the leadership, governance and operations of these institutions are the sole responsibility of their respective owners, boards of directors and administrators. Furthermore, decisions on actual funding levels and policies lie with the Governor and Legislature.

The strategies outlined in this plan consider HECC’s role and the need for deep partnership with the communities, organizations, institutions and policymakers that can help drive systemic change to ensure that Oregon reaches its aspirational 40-40-20 goals and that the course through which Oregonians seek postsecondary education is student-centered, accessible and affordable.



# Introduction: The State's Higher Education Goals and Our Progress Towards Them

The HECC is required by law to “adopt a strategic plan for achieving state postsecondary education goals” (**ORS 350.075**). So what are those goals? The statute establishes that HECC’s strategic plan goals should be related to, but need not be limited to, the following:

- Increasing the educational attainment of the population;
- Increasing this state’s global economic competitiveness and the quality of life of its residents;
- Ensuring affordable access for qualified Oregon students at each college or public university; and
- Removing barriers to on-time completion.

One can find still other goals for higher education elsewhere in Oregon law. These include: “creating an educated citizenry to support responsible roles in a democratic society and provide a globally competitive workforce,” “creating original knowledge and advancing innovation,” and “contributing positively to the economic, civic, and cultural life of communities in Oregon,” (**ORS 350.009**); as well as “to provide the ability to enter the workforce immediately,” and “to provide the means for continuation of academic education, career and technical education, or the attainment of entirely new skills as demands for old skills and old occupations are supplanted by new technologies.” (**ORS 341.009**).

Clearly, our Commission’s strategic plan is expected to address various aspirations for Oregon’s postsecondary enterprise. This is consistent with the variety of our postsecondary institutions and their respective missions. The goals of higher education are diverse, reflecting the enormous impact that higher education has on the state’s economy and society, present and future. Higher education cannot be reduced to a single number, assessed formulaically, or be improved simplistically.

This plan follows our statutory charter in being organized around three primary aspirations for Oregon higher education:

- (1) improving educational attainment and completion;
- (2) improving Oregon’s economic competitiveness and quality of life; and
- (3) ensuring that resident students have affordable access to colleges and universities.

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At the same time, we believe the most effective strategic plans are organized around a limited number of measurable goals. They elevate certain priorities, and diminish others. This plan follows our statutory charter in being organized around three primary aspirations for Oregon higher education: (1) improving educational attainment and completion, (2) improving Oregon’s economic competitiveness and quality of life; and (3) ensuring resident students have affordable access to colleges and universities.

## Oregon’s Progress Toward Improving Educational Attainment

As the result of the 2011 law, state goals related to improving educational attainment and completion are well known, well defined, and quantifiable.

The Legislature declares (**ORS 350.014**) that “the mission of all education beyond high school ... includes the achievement of the following by 2025:

- “40 percent of adult Oregonians have earned a bachelor’s degree or higher.

- 40 percent of adult Oregonians have earned an associate degree or postsecondary credential as their highest level of educational attainment.
- 20 percent of all adult Oregonians have earned at least a high school diploma, an extended or modified high school diploma, or the equivalent of a high school diploma as their highest level of educational attainment.”

The goal, known as “the 40-40-20 Goal,” has become shorthand for the efforts of the Legislature, Governor, the Chief Education Office (formally Oregon Education Investment Board), other state education boards, commissions, and agencies to significantly improve the education achievement levels and prosperity of Oregonians by 2025. It implies that Oregon intends to become one of the best-educated populations in the world. The 40-40-20 Goal establishes a clear target — a “North Star” aligned with Oregonians’ economic, civic, and social aspirations — against which to gauge the state’s educational progress. We believe that for the goal to be meaningful,

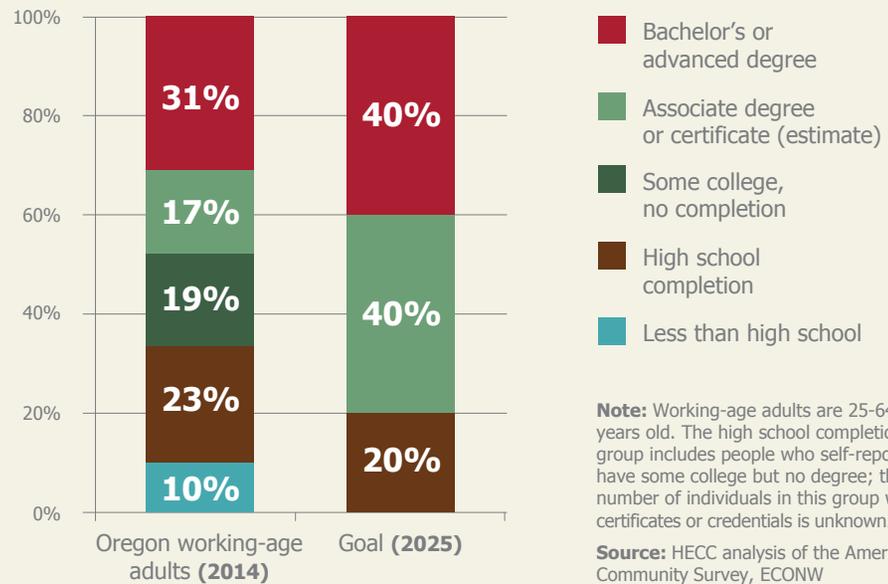
Fundamentally, the 40-40-20 Goal says that every Oregonian is capable of earning at least a high school diploma and that most should earn some form of postsecondary credential.

it must be accompanied by the clear understanding that increased levels of attainment of diplomas, degrees and certificates must be achieved equitably, with Oregon’s diversity — of race, ethnicity, gender, home language, socioeconomic status and geography — equally well-represented in each stage.

More than a numerical target, however, 40-40-20 expresses a distinct point a view about the capacity of learners and the responsibility of the education system to support them. Fundamentally, the 40-40-20 Goal says that every Oregonian is capable of earning at least a high school diploma and that most should

earn some form of postsecondary credential. The job of policymakers, educators, and community members, then, is to adopt the policies and practices to ensure that they do so. It emphasizes degree and certificate completion, and it draws our attention to achievement data that calls for a robust response on behalf of greater equity. If taken seriously, and not just as political rhetoric, these are powerful statements that represent significant departures from the implicit assumptions of the past. They imply the need for equally significant departures in educational policy and practice.

**TABLE 1 Educational Attainment Rates for Oregon Adults Versus 40-40-20 Goal**



## Where are we now?

While the state has made modest progress towards the 40-40-20 Goal since its adoption in 2011, the gap between Oregon's aspirations and its reality remains stark.

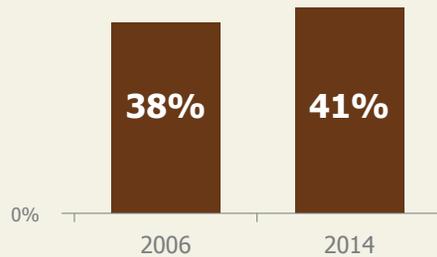
Table 1 displays current educational attainment rates for Oregon adults, compared with the attainment goals of 40-40-20.

The gulf between the state's aspirational goals and actual levels of attainment is even greater for African American, Hispanic, and Native American Oregonians, among other populations. In 2013, adult Oregonians belonging to those groups were, combined, less than half as likely as the overall adult population to have earned a bachelor's degree and about 25% less likely to have earned an associate degree or certificate.

## Which direction are we heading?

While we have considerable work to do to achieve the 40-40-20, the overall trend is positive. Between 2006 and 2014, the percentage of working-age (25-64 year-old) Oregonians with associate degrees or certificates edged upward from 38% to 41%. This increase represents the existence of nearly 96,000 more working-age degree-holders in Oregon today than a decade ago, at a time when the total population for this age group grew by about 88,000. Oregon's increase mirrors a national trend for this time period

**TABLE 2** Percentage of 25-64 Year-Old Oregonians with an Associate Degree or Higher



Source: American Community Survey, 2014

that is likely associated with the large numbers of unemployed and underemployed Americans who enrolled in higher education during the Great Recession. Oregon also benefits somewhat from migration patterns whereby more degree-holders migrate into the state than out of it; this likely contributes to the fact that the overall share of Oregon's population with degrees, as well as the increase it has seen in this figure since 2010, slightly outpaced the U.S. average.

## Where are we now: the education "pipeline"?

Under statute, 40-40-20 is a goal for the entire adult population, and the preceding discussion focused on the state's progress specific to the 25-64 year-old age group. A different and no less important perspective

comes into view when we look specifically at higher education outcomes for recent cohorts of Oregon high school students. This analysis accounts for the eventual higher education outcomes of recent cohorts of Oregon high school students, regardless of whether or not they attended college or university in Oregon. By restricting its focus to the experience of recent Oregon high school students, it neither credits Oregon for the in-migration of well-educated adults, nor working-age adults who return to school to earn certificates or degrees later in their careers.

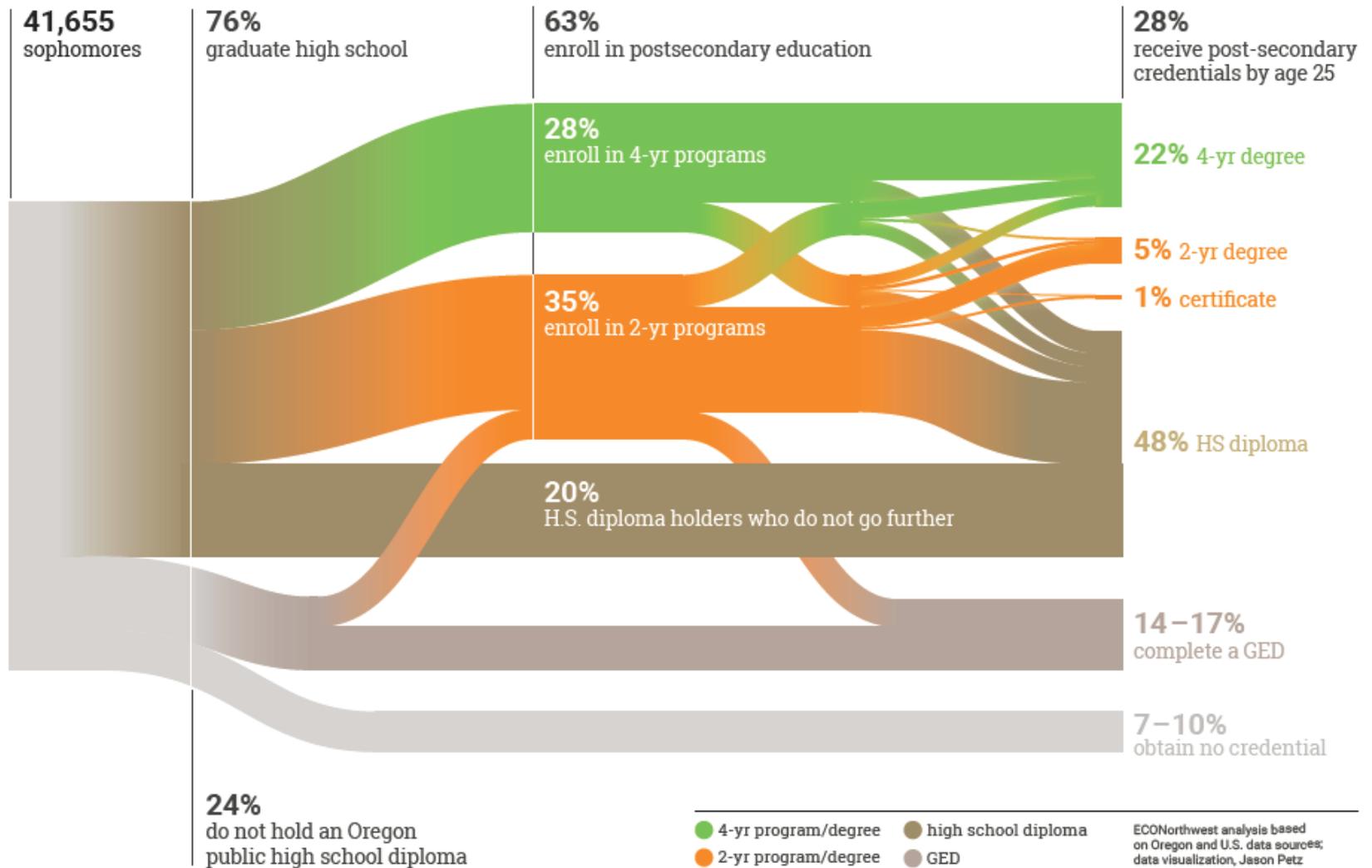
To date, the most comprehensive analysis of this kind focuses on the 41,655 sophomores who were enrolled in Oregon public high schools in 2003-2004, and its findings are startling. By 2013, seven years after the students expected date of high school graduation from this cohort:

- 7-10% had not completed high school or earned a GED;
- 62-65% had completed high school/GED but not earned a certificate or degree;
- 6% had earned a certificate or two-year degree;
- 22% had earned a four-year degree.

# The Education Pathway

Where the Oregon public high school class of 2006\* went over the next nine years

\*sophomores in 2003-04



Students in this cohort who were low-income or students of color experienced even less access to and success in higher education; for example, just 12.5% of low-income students and 11.5% of Latino students in this cohort had earned any certificate or degree by 2013 (compared with 28% overall).

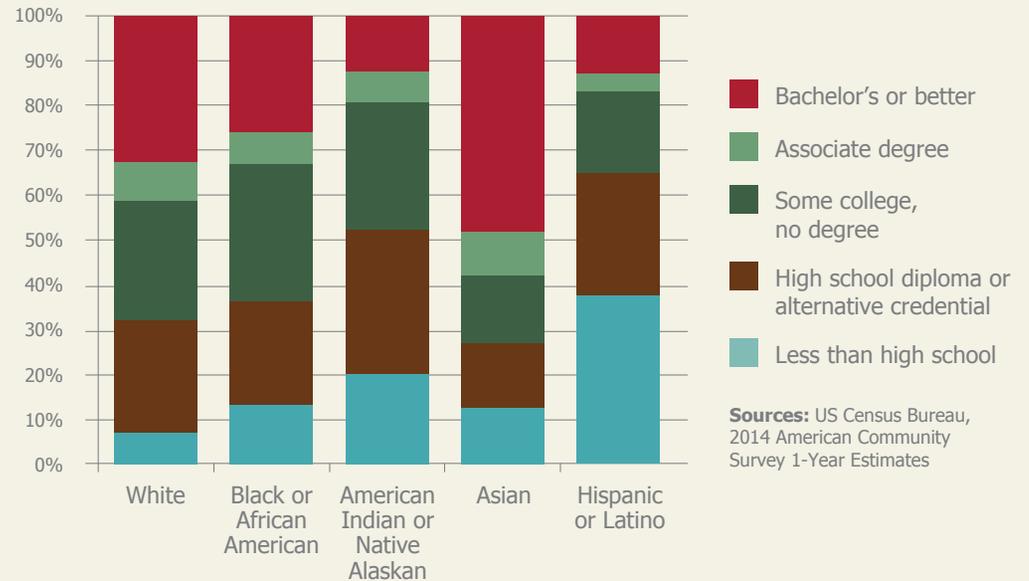
While we can reasonably expect the percentage of degree earners to rise somewhat over the next several years as some members of this cohort complete their college journeys, it appears unlikely that this group of recent Oregon high school students will reach the same level of educational attainment enjoyed by older Oregonians, much less reach the attainment levels needed for 40-40-20.

## Summary

Oregon's 40-40-20 Goal provides policymakers with a rough measuring stick to evaluate the state's progress towards creating educational, economic, and civic opportunity for all Oregonians. Viewed through this lens, Oregon has considerable work to do before reaching 40-40-20, especially among students of color, low-income and rural students.

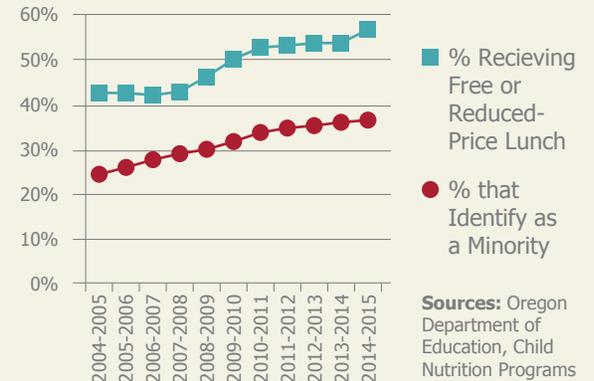
While the HECC continues to view 40-40-20 as an overarching statutory guide for higher education policy and investment, we also increasingly appreciate its limitations. Even with some of the refinements discussed later in this Plan, 40-40-20 will remain a highly imprecise barometer for higher education.

**TABLE 4 Educational Attainment by Race in Population 25 and Over (2014)**



While the HECC continues to view 40-40-20 as an overarching statutory guide for higher education policy and investment, we also increasingly appreciate its limitations.

**TABLE 5 Oregon K-12 Low-Income and Minority Students (2014)**



# HECC Strategies

## 2016 - 2020

Goal-setting, Funding, Pathways, Student Supports, Affordability,  
Research, Innovation, and Workforce Development

# 1 Goal-setting.

Sharpen our state higher education goals and better describe our progress in meeting them

## Background

The HECC is uniquely responsible for developing goals for Oregon higher education, for collecting data and other information from our institutions and other higher education partners, and for reporting on the progress of our state and institutions towards meeting these goals.

Having clearly stated goals and measuring our progress towards them can serve at least two important functions:

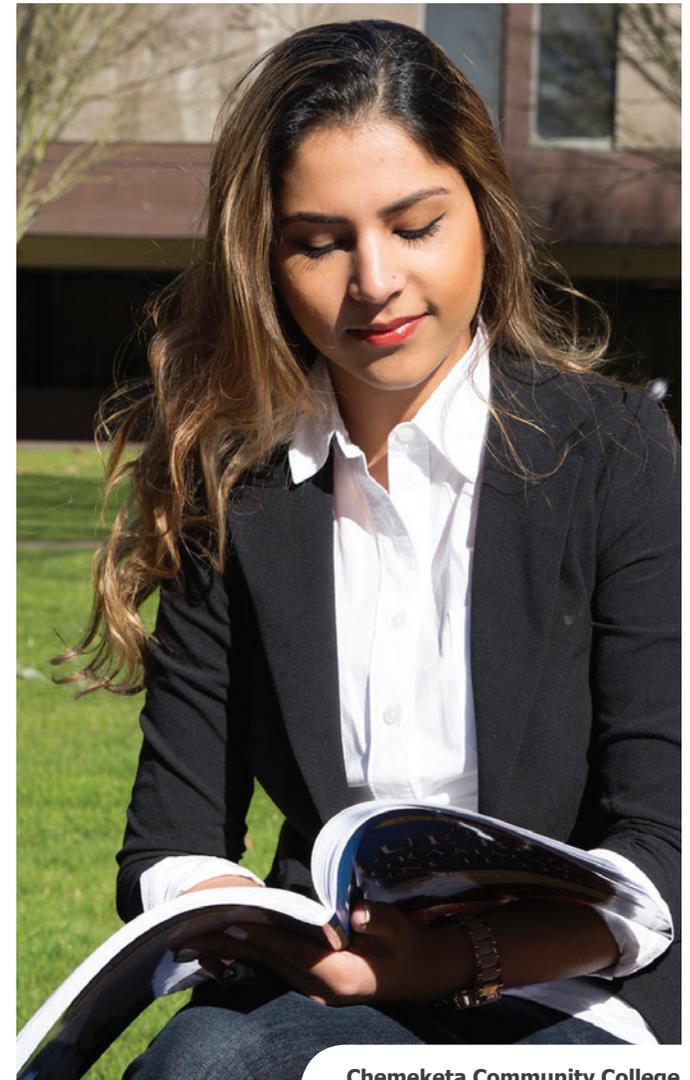
- To shape the Commission's strategic plan, its policy agenda, and its biennial funding request to the Governor and Legislature.
- To shine a public spotlight on state and institutional progress, including areas of strength as well as areas for growth, in order to help draw attention, resources, and commitment to key priorities.

## HECC Strategies

→ Develop a new adult educational attainment goal, distinct from 40-40-20.

Oregon's 40-40-20 Goal exists in law today as a goal for the entire adult population, to be reached by 2025.

A rigid interpretation of the statute would imply that the state should undertake a massive effort in adult education. It would suggest that hundreds of thousands of Oregon adults of all stages of their lives and careers, including even those nearing or past retirement age, should be encouraged to continue or complete their education and training. It would suggest that this effort should be undertaken without regard for the job opportunities that may, or may not, be available to these new, adult-age GED, certificate, and degree completers.



Chemeketa Community College

The HECC will work with the Oregon Workforce Investment Board (OWIB), along with our community and institutional partners, to develop a new adult educational attainment goal, distinct from 40-40-20, for possible introduction to the 2017 Legislature.

In doing so, we recognize several key points:

- Increasing training and educational opportunities for working-age adults, including those who exited the education system many years ago, should remain a top priority for the HECC and the State of Oregon.
- How we set our specific training and education goals for working-age adults should reflect actual and projected labor market demands and employment opportunities. Because the condition of the economy and labor market changes continuously, our goals for this population will require periodic refinement.
- For younger, school-age Oregonians whose education today is preparing them for a lifetime of work and community participation, with demands and opportunities we can hardly begin to imagine, the 40-40-20 goal remains an appropriate target.



Eastern Oregon University

Our work on this strategy will require addressing certain definitional issues. For example, how will we define the “adult population” to which a separate educational attainment goal should apply? While it is appropriate for us to consider questions like this, we should consider maintaining the relative simplicity of the current formulation of 40-40-20. Like 40-40-20, a new adult educational attainment goal should serve as a general compass heading for state policy and investment proposals and a rough yardstick for measuring state progress, not as a precise formulation meant to drive highly specific programs, activities, or accountability measures.

While the primary emphasis of this strategy will be on developing an overarching adult education goal for consideration by the Legislature, attention should also be paid to the development of non-statutory targets for specific areas of state focus that are supported by HECC staff in conjunction with the Oregon Employment Department and Oregon Workforce Investment Board. This could include developing specific goals for GED completions, services to dislocated workers, incumbent and other worker training, and youth employment opportunities. Likewise, the Commission should also explore the potential appropriateness of developing targets for graduate degrees which 40-40-20 does not clearly distinguish today.

This strategy builds on recommendations made by the HECC and OWIB joint task force in 2014.

→ Develop interim 40-40-20 targets, both for overall student cohorts as well as for specific cohorts of underrepresented students.

In order to make 40-40-20 more actionable for institutions and for the State, we will develop a set of interim targets to describe the annual or biannual progress required to reach that ultimate objective. Moreover, the HECC will describe the separate, often steeper trajectories necessary to ensure that students of color, low-income and rural students achieve 40-40-20 in the same timeframe as their peers. The HECC



Eastern Oregon University

should produce annual or biannual reports on our progress against those interim measures.

Consistent with the previous strategy, these interim and disaggregated 40-40-20 targets, and our associated reporting on progress towards reaching them, will focus on the younger, “pipeline” population and not the older adults who will be the focus of a distinct educational attainment goal.

→ Conduct public reporting on higher education outcomes, in aggregate and by institution, in a more systematic way and with an equity focus.

For institutions, policymakers, and the public to effectively target efforts to improve higher education requires a clear and systematic understanding of the outcomes that our students are experiencing. This is especially true for entities, like the HECC, that have placed a particular emphasis on improving equitable outcomes. Likewise, prospective students and their families will make better decisions about whether and where to attend college or university when they are equipped with information that increases their understanding of the outcomes experienced by students with similar characteristics to their own.

By 2019, the HECC staff should develop at least annual reports on key higher education outcome measures, including but not limited to certificate and degree attainment. Those reports should be prepared for the state overall as well as on an institution-by-institution basis. The HECC staff should also explore the development of online tools to assist Oregon residents in better understanding outcomes experienced by students like themselves.

In its analysis and reporting on state and institutional progress towards reaching state goals, the Commission should adhere to the recommendations it adopted jointly with the Oregon Workforce Investment Board in 2014. These include the following:

- Casting a wide net when considering what counts for the middle 40. All associate degrees, credentials, licensures and certifications issued by accredited public and private institutions, registered apprenticeships, recognized industry associations or identified third party vendors should be included in our tally of what constitutes the middle 40.
- Measuring and reporting on the number of Oregonians who have earned credentials at any level, as well as on all middle 40 credentials earned. To do so will require the collection of student-level data from a variety of sources that award credentials that “count” for the middle 40.

Likewise, the Commission should partner with the newly-formed Oregon Talent Council to measure, analyze, and report on the state’s progress in addressing the “talent gap,” i.e. the apparent under-production of college graduates in degrees (bachelor’s and advanced) who are prepared for work in high-wage jobs in traded sector and high growth industries.

**“By 2020, two thirds of all jobs will require postsecondary education.”**

(national figure)

~ Lumina Foundation

Before launching any new reports and tools, the Commission will carefully evaluate what may already be available to students and the public, including federal resources such as College Navigator and College Scorecard. Likewise, this work should build on institution-driven efforts to develop standard measures and reporting mechanisms such as the Voluntary Framework for Accountability. This work will also benefit from efforts, led by the state's Chief Education Office, to develop a data system that combines longitudinal student records from early learning, preK-12, higher education, and the Employment Department.

Finally, the Commission's work in this regard should be accompanied by a clear appreciation that educational outcomes data does not, on its own, tell a complete story. Data can help draw our attention to issues and areas that require further investigation, but it is not generally sufficient for making sound policy or investment decisions. For this, further context is often required.

→ **Improve state and institutional capacity for collecting, analyzing, and reporting on student data. Work with colleges and universities to develop stronger mechanisms to capture student intent and aspirations.**

The preceding strategies imply that the HECC and its institutional partners have robust systems, staffing, and expertise for the collection, analysis, and dissemination of data. In actual fact, the ability of colleges and universities to collect and maintain accurate data, and the ability of the HECC to receive, analyze, and report on it, varies greatly. While all of Oregon's public institutions have developed the ability to systematically capture and report core data that drives state funding or is required for federal reporting (e.g. enrollment and, for public universities, certain outcome measures), there is tremendous variation in their ability to accurately collect additional student-level data—including, for example, even basic demographic information about students. Even where the capacity for this sort of additional data collection exists, it may occur according to local protocols and definitions that make comparisons with other institutions difficult or impossible.

### A CLOSER LOOK AT D4A

In 2016, the HECC will launch the state's first enterprise level postsecondary data reporting system. Known as D4A, short for "data for analysis," this system will house student level data that will allow for greater flexibility and analysis of Oregon's higher education system. D4A aims to make the data collection process more efficient and improve the quality of data collected. Additionally, it will offer a publicly accessible dashboard that will provide interactive data visualization tools.

For its part, the HECC has limited resources for (a) working with institutions to develop appropriate, standard definitions across a wide range of measures of interest; and for (b) publicly reporting on data accurately, systematically, and for dynamic audiences. The HECC's multi-year work to create D4A, a web-based data collection and reporting system currently focused on community college data, is a promising development, but additional support will be necessary to expand its functionality and to include, for example, student data from public universities and private schools.

The limited capacity of agencies and institutions to accurately collect, store, and evaluate student data contributes to the fact that state and federal higher education agencies tend to rely on woefully insufficient measures of success in higher education. Federally-reported graduation rates, for example, take into account only first-time, full-time students, at least partly because of the lack of consistent capacity at the state and institutional level to collect and process, in a standardized way, more robust information about students. Improving this capacity will in turn improve our ability to accurately diagnose issues and tailor strategies for improvement.

The HECC should seek additional funding, including but not limited to legislative appropriations, to (a) support the capacity of Oregon public institutions to improve their data collection, maintenance, and submission systems; and (b) support the HECC's ability to effectively report on educational outcomes for Oregonians.

## 2 Funding.

Use effective advocacy to increase public funding for higher education

### Background

The story of Oregon higher education between 2007 and 2013 is the story of two extraordinary trends: a 16% increase in enrollment and a nearly 30% drop in state funding. Although since 2013 enrollment has leveled off and state investment has increased, Oregon's public institutions have not fully recovered from recession-era cuts. Moreover, the primary fiscal strategy that colleges and universities used to weather the recession—tuition increases that totaled about 50% by the end of the time period and have continued to rise since, albeit more slowly—has created a “new normal” for students who are more financially vulnerable than they were in 2007.

These factors would present a significant funding challenge for the HECC even if its goal were merely to maintain the status quo for Oregon students. In the context of the state's goals for aggressively improving higher education attainment levels, however, the funding challenge is truly enormous. Significantly improving educational outcomes at the same time students are facing higher college costs and more job opportunities elsewhere is likely to require major investments in targeted financial relief and on-campus student supports that improve their likelihood of success and completion. And for institutions to be able to make these student-focused investments, they must first have sufficient revenue to contend with looming cost increases that will affect the core of their operations, including the escalation of their retirement funding obligations, as well as revenue to rebuild institutional reserve funds in anticipation of the next economic downturn.

In 2015, the State of Oregon invested nearly \$2,178 less, or 31% less per college or university student than the U.S. average, ranking the state

In 2014, the State of Oregon invested less than two thirds of the U.S. average in each college and university student, ranking the state 46<sup>th</sup> in public higher education funding nationally.

45th in public higher education funding nationally. While more recent state budgets have likely brought Oregon several steps closer to average, it remains the case that Oregon significantly lags behind most of the country in higher education funding.

The strategies in this Plan are designed to help the state meet ambitious goals. They are accordingly ambitious and, while our strategies do not rely on funding alone, funding is indispensable to helping Oregon move towards its goals.

### HECC Levers

The Legislature and the Governor, not the HECC, determine how much funding to appropriate to Oregon higher education. The Legislature and the Governor, not the HECC, are responsible for answering even larger questions that significantly impact higher education's opportunities, including taxation and revenue, public safety and human service funding, and the Public Employees Retirement System (PERS).

Formally, the HECC's role in determining how much the state should spend on higher education is limited to developing a biennial budget request to the Governor (our “Agency Request Budget”) within whatever

parameters have been established. This document, however, along with the HECC's subsequent advocacy to the Legislature on behalf of the Governor's budget recommendations, gives the Commission an opportunity to clearly and convincingly connect the relationship between state investments in higher education and student outcomes. Whatever the Legislature chooses ultimately to invest in higher education, the HECC should allow its members and the public to clearly understand what the impact of that investment is likely to be.

## Strategies

→ Develop a comprehensive model of the costs that will be required to meet state goals and advocate to fund it.

To make useful and compelling budget recommendations to the Governor and Legislature, we require a comprehensive model that links state funding inputs to student achievement outcomes and takes into account the specific demographics of the students whom the state will need to serve to reach its goals. This model should build on previous efforts, including work undertaken by the Postsecondary Quality Education Commission in 2007, the National Center for Higher Education Management Systems (NCHEMS) for community colleges and the State, and HECC staff in 2014-15.

The basic purpose of the model should be to estimate the state investment necessary to reach different levels of higher education attainment. Building it will require an accurate understanding of the existing relationship between costs/expenses and student outcomes. We do not, however, assume that the education system of the future will be identical to the one that exists today. To be useful, the model must be dynamic; that is, it should permit the user to adjust non-fixed factors such as the following:

- High school completion and college readiness rates;

- The proportion of college students enrolling in the various higher education sectors: public two-year, public four-year, and private; and
- Completion rates and time-to-degree, by sector.

The model will require estimating the educational and instructional costs, per student, at different institutional types. In establishing this, it should distinguish between marginal and average costs, as the cost of adding an additional student to an institution is likely less than the average cost per student. At the same time, the model should take into account the likely additional costs associated with serving additional students who on the whole may be lower-income and less well-prepared academically than the traditional college population.

If the model is built to predict the total costs under different scenarios, it should permit the user to model how those costs should be shared amongst various payers: the federal government (primarily through the Pell Grant), the State (through institutional support and scholarship aid), and students (through tuition).

Finally, the model should account for the likelihood that state fiscal conditions will deteriorate during the next economic downturn. In past recessions, state funding for higher education has suffered disproportionately. The model should permit the Commission to consider what investments would be required to establish sufficient reserve funds at either a state level, an institutional level, or both, in order to ensure reasonable levels of stability through full economic cycles of recession and recovery.

# 3 Pathways.

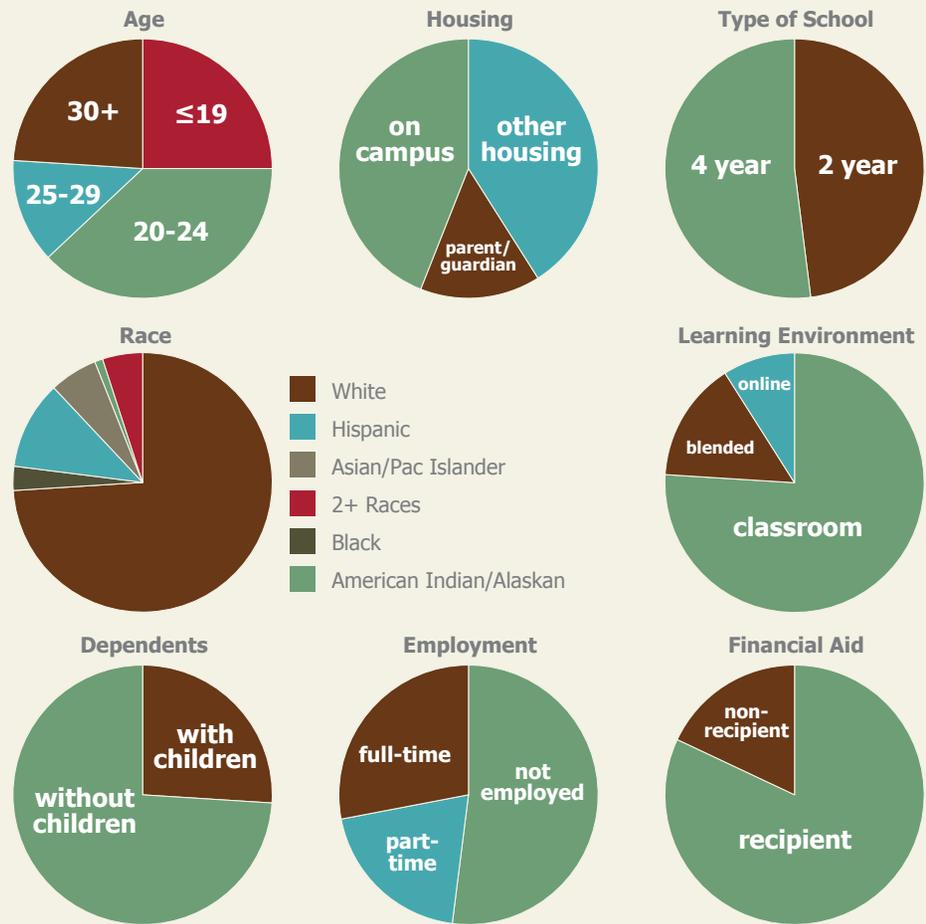
Simplify and align systems and structures for student entry, navigation, completion, and exit/re-entry to career.

## Background

Today's students are older, more mobile, and more diverse than ever before. They are more likely to be juggling higher education with job and career, and to be caring for family members. They are more likely to be earning credit at more than one college or university, public or private. They are more likely to be taking at least some courses online or through options that blend distance learning with conventional classrooms and/or practicums. They are more likely than ever before to have earned college credit through high school and/or work-based prior learning experiences. And if non-traditional populations are going to receive even greater levels of access to higher education—as Oregon's goals appear to require—these trends will need to accelerate still further.

The new student majority requires more options for education, but greater choice without adequate support makes education seem more like a maze than a pathway. The traditional four-year, residential model for undergraduate education, focused on 18-22 year-olds, is a well-worn path that is reasonably successful at producing graduates. On the other hand, successful completion of certificate and degree programs is more elusive for part-time students, for older

TABLE 5 Snapshot of Oregon Students (Undergraduate)



Source: 2013 OUS Institutional Research analysis of data from National Center on Education Statistics.  
 Note: Housing, Employment, and Dependents figures are based on U.S., not Oregon-specific data.

students, students who enroll intermittently, students who are enrolled primarily in online courses, and students who move more frequently.

We do not accept that our response to this challenge should be to limit options and push students towards traditional models of higher education that simply aren't realistic or appropriate for an increasing number of students we serve.

Rather, our strategies should be twofold—(1) engineering smoother, simpler pathways from remedial education through graduate school, allowing students to take greater advantage of the multiplicity of postsecondary learning options; and (2) improving the capacity and ability of our institutions—especially those that serve large proportions of non-traditional populations—to help those students succeed (*described further in Strategy 4: Student Success*).

The [2012 Task Force on Higher Education Student and Institutional Success \(HB 3418\)](#) described “poor management of transitions between education institutions” as one of six programmatic and structural barriers which, in addition to inadequate funding, stands in the way of student success. The Task Force concluded, “High schools, community colleges and universities need to work together to ensure that transitions are clear and that credits are transferred to the maximum benefit of students. They also need to ensure



that the learning in all courses provides an adequate foundation for subsequent coursework at higher levels. This includes identifying and removing unjustified redundancies between programs, and eliminating organizational redundancies and complicated organizational structures and/or silos that impede efficiency. ... There is simply not enough communication and understanding between educational sectors.”

Our efforts to address this longstanding issue with interinstitutional coordination should build on Oregon's history and modest successes in this regard. Students should receive better maps at the outset for navigating their journeys from first course to career. They should encounter fewer barriers to transfer credits from institution to institution. They should have increasing options for and guides to building their higher education progression on foundations of work experience. They should be better supported in exploring and determining their ultimate objectives, and linking those goals to their courses of study.

To effectively serve increasingly complex students who seek access to relevant and innovative learning options, our education system should be engineered to enhance the portability, flexibility, coherence, and relevance of postsecondary options and ultimately, the ability of students to pursue successful careers.

## HECC levers

A central reason for the existence of our coordinating commission is to engineer simpler, more effective, and efficient learning pathways for students in every postsecondary sector—public and private, trade school and university, online and traditional. The tools at our disposal for this work are significant, and include the following:

- The publication of data, collected and analyzed by the HECC, that helps inform learners about their education options and likelihood of successful completion and job attainment.
- The convening of academic experts, including national experts and Oregon faculty from multiple institutions and sectors, to lead and advise in the development and updating of common certificate/degree pathways.
- The approval and application of standards related to dual credit (**ORS 340.310**), credit for prior learning (**ORS 351.751**), and transfer degrees at community colleges (**ORS 341.430**).

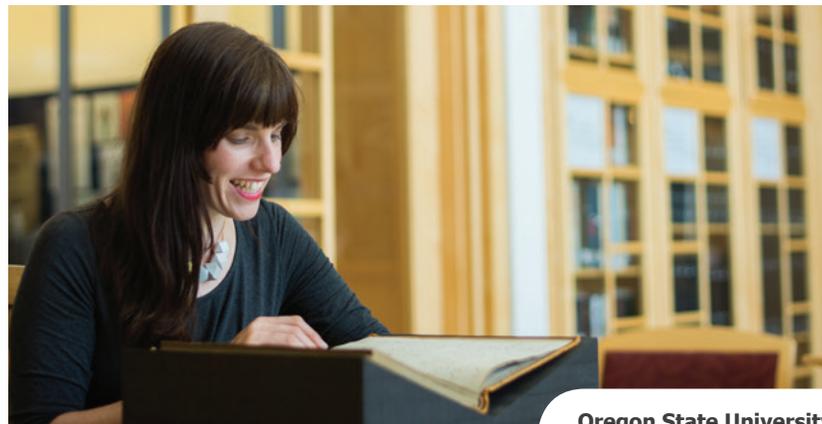
- The approval of new or significant changes to academic programs at community colleges and public universities (**ORS 352.089, 341.465, and 351.735**).
- The licensure and oversight of private career schools and non-exempt private degree-granting schools, in accordance with standards established by the law and by HECC administrative rule.
- The annual evaluation of public universities, which may report on their contributions to creating smoother pathways for learners including community college transfer students (**ORS 352.061**).
- The recommendation of the state budget and decisions about state funding allocations for community colleges and public universities.
- The encouragement and facilitation of innovative strategies for student success including accelerated pathways, online learning, and new degree transfer partnerships.

## Strategies

→ Develop the pipeline: support colleges and universities in fostering deeper partnerships with school districts and community or regional organizations (e.g. Regional Achievement Collaboratives) to improve preK-12 outcomes.

→ Improve the alignment of learning standards and outcomes between high school and higher education, between higher education institutions themselves, and between higher education and career.

While Oregon policymakers, educational leaders, and practitioners have invested considerable energy over the years tackling issues of alignment between institutions and sectors, with some success, we believe this should become an area of even greater focus in the years to come. There are several dimensions to this effort:



Oregon State University

- In partnership with the State Board of Education and the Oregon Department of Education, and advised by educational leaders from preK-12 and higher education, the HECC will reassess whether Oregon's current standards and expectations for high school graduates are consistent with what we expect matriculating students at colleges and universities to know and be able to do upon entering school. Particular attention should be paid to whether high school math expectations and course sequences remain consistent with college expectations and standards, especially in view of the work that the HECC recently completed to support colleges in developing a new math pathway that is not centered on College Algebra. Solutions should be developed to address any misalignment.
- The HECC will continue work launched in mid-2015 to guarantee the quality and portability of college credits earned in high school, while expanding equitable access to these accelerated learning programs. The HECC's dual credit standards and approval process should be reviewed and renewed, taking into account emerging accelerated learning models that rely increasingly on demonstrations of student mastery in the awarding of college credit. Accelerated learning programs and policies will be assessed to ensure that the college credits and experiences they promote provide actual value to high school students, and don't merely reflect the awarding of credit for credit's sake.

- To reduce credit loss and reduce time-to-degree for transfer students, the HECC will develop and support work that builds on prior efforts to establish common learning outcomes, especially for the general education requirements common to most bachelor's degrees, and to clearly link institutional course offerings to those common outcomes. We will also develop and support efforts to make Career and Technical Education (CTE) courses more transferable, especially among community colleges and to universities.
- Building on efforts such as the Association of American Colleges & Universities' "Liberal Education and Americas Promise" (LEAP) initiative, we will work with our institutions to meet employers' expectations for relevant preparation and our communities' need for more engaged and informed citizens.

Our approach to improving the alignment of higher education in Oregon relies less on creating clear channels for institutions than it does clear channels for learners. Over time, we envision shifting from a system where boundaries between sectors and regions are kept rigid while learning standards and outcomes are allowed to be malleable, to a system where essential learning standards and outcomes are the scaffolding upon which a variety of institutions (high schools, two and four-year universities, public and private) are encouraged to innovate and flourish. To be clear, this scaffolding must be built by educators, not the HECC. The HECC's role is to convene, encourage, support, and, within the limited authority provided by the Legislature, adopt policies and standards that result from this work.

→ Promote degree pathways and related initiatives that increase opportunities for postsecondary students to build on career-oriented education and workplace experience.

The traditional pathway to earning a bachelor's degree in the U.S. involves approximately two years of basic study in a variety of disciplines—

courses intended to introduce students to different major options as well as impart essential skills and understandings required for citizenship, employment, and scholarship—followed by approximately two years of increasingly advanced study in a particular field, or major. While this pathway continues to serve many community college and university students well, it may not provide sufficient flexibility to serve the increasing diversity of student needs, desires, and backgrounds associated with the expansion of higher education contemplated by this Strategic Plan.

Students for whom the traditional bachelor's pathway may not be optimal include those who first earn a CTE certificate or applied associate degree and later on, likely after a period of employment in their field, seek a bachelor's degree. For example, early childhood educators, many of whom initially earned an early childhood certificate through a community college, are increasingly being encouraged (including by Oregon state officials) to attain bachelor's degrees in order to develop and advance in their profession. For this and other fields, we should explore and develop options, such as Eastern Oregon University's Bachelors of Applied Science in Emergency Medical Services and other applied baccalaureate degrees, that increase the opportunity for learners to "stack" general education courses on top of more specialized studies in order to complete a degree. Even for traditional-age students, the option to take an "inverted" pathway to degree may be appealing and motivating if it permits them to more deeply explore—and even experience—career opportunities at the outset of their college journey rather than at the end.

Distance education is likely to play an important role in the continued development of these options.

→ Create better connections between higher education and training and employer needs.

Throughout this section, our language and thinking borrows heavily from Oregon's longstanding work—particularly at the community college

level—to develop and promote formal “career pathways” for learners. Oregon is a recognized national leader in this work, with other states seeking to emulate Oregon’s success at designing, delivering, and promoting these opportunities. In this context, “career pathways” are understood as well-defined sequences of high-quality education, training, and services that are connected to particular industry skill needs. A single career pathway may include apprenticeships, on-the-job training, and non-credit or credit-bearing education and training, and may result in the awarding of “stackable” industry-recognized credentials, certificates, and/or degrees. Career pathways are designed to have multiple entry and exit points that allow individuals to achieve their education and employment goals over time.

Like the more general “pathways” that we have envisioned and described throughout this section, well-designed career pathways help learners make sense of the myriad choices available to them for education and training and help to accelerate momentum towards career attainment. Moreover, career pathways in particular serve as a key milestone-and-momentum point for non-traditional learners, including youth, and support business needs for skilled workers, while also providing opportunities to build on initial college or industry credentials to advance in their educational path and careers. Significantly, employers play an important role in designing specific career pathways, helping to ensure that learners gain knowledge and skills that are directly transferable to the workforce.

To support student success—not merely in the acquisition of a certificate or degree but also in post-graduation success—the HECC will continue to strengthen Oregon’s system of formal career pathways.

This strategy builds on [recommendations](#) made by the HECC and OWIB joint task force in 2014.



## 4 Student Support.

Strengthen the ability of campuses and communities to support student safety, success, and completion.

### Background

The key to meeting Oregon's higher education goals is to improve the outcomes of students who are choosing to enroll in postsecondary education, but not completing. Additional focus needs to be directed toward boosting both enrollment and completion rates for students who are underrepresented in higher education, namely students of color, low-income, and rural students.

On a purely mathematical basis, Oregon students enroll in higher education at rates that are nearly sufficient to meet the state's 40-40-20 goal. Looking at a case study of Oregon's graduating high school class of 2006, 63% of Oregon's expected high school class (and 80% of the actual graduating class) enrolled in postsecondary education within the next nine years, many of them at Oregon community colleges, private colleges, and public universities. However, only 28% of that overall cohort had actually earned a postsecondary certificate or degree by 2014. These figures suggest to us that our primary challenge and opportunity is to improve the success of students who are enrolling, but not completing.

The work to improve student outcomes must be led, developed, and implemented by institutions and community organizations that serve students most directly. The HECC's role should be to facilitate, incentivize,

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Only 28% of Oregon's graduating high school class of 2006 who enrolled in postsecondary education within Oregon had earned a certificate or degree by 2014.

and support those activities. We share the view of the [2012 Task Force on Higher Education Student and Institutional Success](#) that the "specific programs, activities, and approaches to accomplish high-impact practices will be different [for each campus], just as their student demographics, missions, and communities are different." We likewise share the Task Force's view that "postsecondary education institutions in Oregon do not need new statutes or directives to help them overcome the barriers to student success."

The problem of student success will not be solved merely as a result of direction from the Legislature or the HECC. Rather, the Task Force goes on to write, "the problem centers primarily on of the need for funding, and the need for technical assistance to ensure that best practices at institutions can be easily and readily adapted by others."

The HECC's recent adoption of a new funding model for public universities—one that allocates state resources partly on the basis of student success and completion, and not merely enrollment—exemplifies how the HECC can support and incentivize institutional efforts to improve student success without becoming overly prescriptive. Our role in advocating for additional funding for higher education is equally vital.

In addition to increasing state funding and aligning financial incentives to the outcomes we seek, the HECC can play an important role in *identifying* common, cross-institutional barriers to success and *convening* higher education leaders and advocates to help address them. For example, virtually every institution in Oregon higher education has increased its reliance on adjunct faculty for teaching undergraduates. While these faculty members are often master teachers, or bring to the classroom invaluable real-world experiences, the nature of their employment

(typically part-time and hired quarter-to-quarter or year-to-year) tends to reduce their ability to provide support, guidance, and mentorship over the duration of a student's experience at a college or university.

The factors that contribute to student success are not limited to often-discussed elements involving instruction, advisors, counseling, and affordability. Student success also depends on having a safe and secure environment for living and learning. Events of the last year, including the shooting at Umpqua Community College in October 2015 and the urgency and courage with which many students of color and their allies have expressed the need to confront issues of racial justice in higher education, remind us that the safety and security of our institutions is vital to student success.

We consider communities, including community-based organizations, as potentially under-utilized assets in supporting students, especially those who are underrepresented in higher education. As the HECC convenes, funds, and advocates for improved student outcomes, it should include community partners at the table on equal footing with more traditional partners. They may be sources of strategies and best practices; they may also be recipients of state funding in support of student success.

Finally, the Commission appreciates that student success should not be understood always just in terms of the completion of

certificate or degree. There may be a variety of reasons that students enroll, especially at the community college level, and success may take the form of a great job or a promotion, even if the program goes uncompleted. We likewise appreciate that the "road map to success" begins before a student ever enrolls in postsecondary education. Our efforts, therefore, must begin before enrollment and focus significantly on the challenge of progression through the sequence to completion.

### HECC levers

With the exception of several targeted efforts led by our Office of Student Access and Completion, the HECC's role is rarely to design or implement specific student success initiatives. Rather, it can (a) establish a funding context; (b) disseminate student success data; and (c) promote cross-institutional sharing and partnership in support of student success goals. Our specific levers in this regard are as follows:

- Making recommendations to the Legislature and Governor on state budget and policy.
- Adopting formulas for the allocation of state resources to public colleges and universities.
- Making strategic grants to test, scale, and support promising practices at the institutional level.
- Convening experts and stakeholders to share promising practices and build

- partnerships among community organizations, student organizations, and campus and national experts.
- Ensuring that the community beyond higher education institutions is also engaged in helping build a culture of college-going and college success. These entities include businesses, community and family organizations, workforce entities, and the preK-12 school system.
  - Using research and data to help Oregonians understand the value and successful pathways to higher education and the labor market.
  - Creating tools and engaging students and families to help them navigate the higher education system more successfully.
  - Annual evaluations of public universities, which may include reporting on student success initiatives and outcomes.



Southwest Oregon Community College

## Strategies

→ Implement, monitor, and adjust HECC funding allocation formulas to create incentives for institutions to invest in student safety and success.

As noted above, the HECC in 2015 adopted a new formula for the distribution of state resources to public universities. The Student Success and Completion Model (SSCM) creates state financial incentives for universities to increase the number of resident students who complete degrees, not merely the number who enroll in courses. The SSCM contains additional funding weights for students of color, low-income, rural, and veteran students, and it is adjusted for the expected cost per degree type. We believe the SSCM will help enable universities to look at investments in student support as revenue “generators” rather than as unreimbursed expenses; much as they look at investments in recruitment and enrollment efforts today. The SSCM is appropriately silent on how the institution should spend state resources to improve student success, whether through hiring additional faculty or advisers or investing in counseling, cultural centers, or data/analytic tools, just to name a few possible examples. Over the coming years, the SSCM will require monitoring and potential adjustment to ensure that it works in ways that the Commission intends.

In addition, the Commission will explore whether the current formula for distributing state resources to community colleges optimizes colleges’ ability and incentive to invest in student success, achieved equitably. We will consider potential adjustments to the current, enrollment-based formula, including (a) weighting for underrepresented students who are the focus of our Equity Lens; (b) weighting for higher-cost programs that often are in higher-demand from students and employers; and (c) incorporating student outcomes, such as momentum points and certificate/degree completion, as part of the basis for distributing funding. These options are not mutually exclusive.

→ Consider the creation of a strategic fund within the Public University Support Fund (PUSF) for the support of statewide, collaborative, university-led initiatives to improve student success; and

→ In partnership with institutions, support the development of center(s) to research, develop, and disseminate best practices for student safety and success.

The state’s primary leadership and expertise for improving student outcomes exists at our institutions. While their strategies vary significantly owing to the uniqueness of their institutions and the students they serve, there are likely certain issues that benefit from taking a common, coordinated approach.

For more than a decade, the community colleges have benefited from a strategic fund, carved out from the community college support fund, that the HECC’s Director of the Office of Community Colleges and Workforce Development (CCWD) has employed to support inter-institutional efforts focused on student success. Several highly impactful and enduring initiatives have resulted, including the development and implementation of career pathways and, more recently, the design and implementation of new approaches to developmental education. These state-funded projects are typically initiated by the colleges themselves, often based on priorities established by a Student Success Oversight Committee (SSOC) comprised of community college representatives and CCWD officials. For public universities, the Chancellor’s Office of the Oregon University System used to play an analogous role in funding and convening inter-university efforts around student success. In its absence, the HECC will explore the creation of a state strategic fund to support inter-university efforts to improve student success.

In a similar vein, the HECC will explore the creation of a “center” or “centers” for the research, development, and dissemination of best practices for student safety and success at colleges and universities. We envision that these would live outside of state government, would be supported by diverse funding sources, including foundation and/or other private funding, and would be led by campus or community experts, not the HECC. They would not necessarily, or even likely, be brick and mortar institutions. Ideally they would operate across sectors (two and four-year institutions, public and private). The HECC’s role could be to help set their agenda and fund their operations, possibly using the strategic funding, as described above.

Where a center isn’t feasible, or where opportunities for collaboration emerge that are outside of a center’s scope, the HECC will continue to convene institutions to share best practices and to develop possible state funding or policy recommendations to improve student success.



University of Oregon

→ Work with the Legislature and other partners to ensure that funding proposals focused on access and affordability are complemented by funding dedicated to student safety and success.

We view “access” and “affordability” as hollow concepts unless resources and commitment are equally applied to improving student success and completion. A student who has access to a modestly priced education, but does not complete a certificate or degree may not be much better off than before. As the cost of higher education will likely to continue to receive focused attention from the public and from legislators, we will particularly endeavor to help those audiences understand that investments in lower cost and increased access—e.g. tuition freezes, the Oregon Promise grant program and/or increased grant funding—may be counterproductive if not accompanied by additional support that builds the capacity of campuses and communities to improve outcomes for the students they enroll.

This approach is also referenced in the affordability section below.

→ Engage students, families, and community groups as partners in efforts to improve student safety and success.

When the HECC convenes and engages our higher education partners to develop and share opportunities for improving student success, we will be intentional about the inclusion of students, families, and community-based partners in those efforts. We will embrace an asset-based, “all hands on deck” mentality that recognizes that significant expertise and influence resides outside of the academy, especially when considering student populations that our education system has historically marginalized. Family members, community organizations, cultural organizations, stakeholders, and students themselves should be major sources of advice and impact for the design and implementation of strategies to improve student success.

## 5 Affordability.

Limit student and family cost for all, with a particular focus on ensuring students rising through Oregon's preK-12 school system may be reasonably certain they will have access to affordable options for higher education.

### Background

The U.S. model of higher education has long assumed that the responsibility of paying for college is to be shared between the public, via state and federal investments, and the individual student and his/her family. This appears to reflect an appreciation that the benefits of higher education accrue both to the public—via healthier communities, more vibrant economies, and diminished need for social supports—as well as to private individuals through their increased earnings and other advantages that higher education generally confers.

While the cost of higher education has always been understood as a shared responsibility, until recent decades it was possible for most students attending public institutions in the U.S., including those of modest means, to earn certificates and degrees without incurring significant debt. Generous public subsidies, focused on a smaller proportion of the population that sought postsecondary education, resulted in tuition and living costs that many students could manage to offset largely or entirely through very modest family support and/or part-time work.

This paradigm has disappeared, a victim of increased demand for higher education, lower family incomes, the rising cost of learning and living, and declining state and federal support. Today, a student would have to work roughly half-time at minimum wage, year-round, just to cover tuition and fees at an Oregon public university—and would appear to still need to find some way to finance an estimated \$10,000 - \$14,000 annually of additional living costs.

To more accurately understand long-term trends in higher education affordability, however, we must look beyond today's headlines focused on steeply rising prices and increasing debt. Prices themselves vary

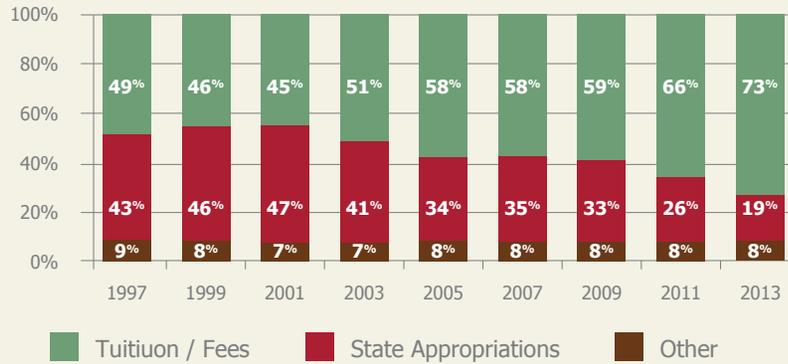
enormously by institution, by level, and even by program. Increasingly, universities aggressively employ tuition discounts, remissions, and scholarships to lower costs for some. A vast, complex, and rapidly changing system of federal and state financial aid makes billions of dollars available annually to U.S. students for their living and learning costs. Even student loan debt defies simple characterization given the enormous variety in borrowing options and associated repayment costs.

The complexity of pricing and financing in modern higher education likely contributes to policymakers' failure to significantly improve the public's perception or experience of its affordability. Noble efforts too often focus only on a single dimension of the problem: for example, increased grant and scholarship funding gets negated by rising tuitions; tuition freezes force campuses to cut resources that are vital for helping more students complete their degrees; high sticker prices enable heavy discounting for low-income and first-generation students, but deter those students from applying in the first place; preserving the perception that every degree program is equally affordable requires using lower-cost programs to subsidize more costly ones. And all the while, the price of necessary supplies, such as textbooks, continues to soar.

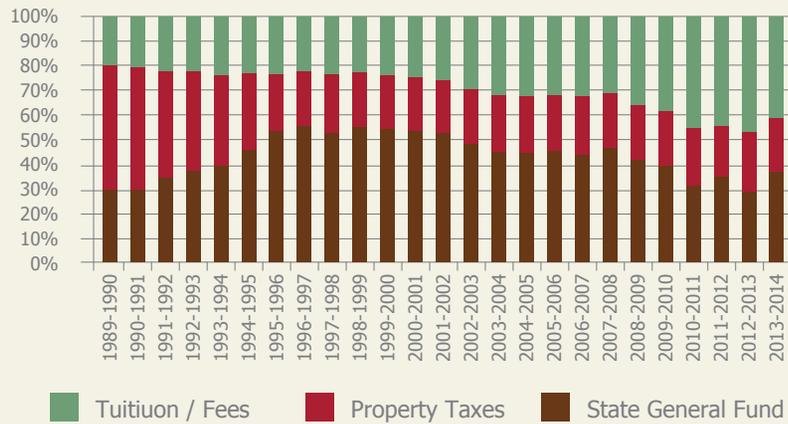


Portland State University

**TABLE 6A Public University Revenue Sources**



**TABLE 6B Community College Revenue Sources**



Sources: Oregon University System, Institutional Research

While it has been surprisingly challenging for policymakers even to understand, much less to solve, higher education’s affordability challenge, this much is clear: on the whole, students and their families bear a much greater share of the cost of funding their postsecondary educations than they did in previous generations. In Oregon, this trend has been especially pronounced; [since 2001 tuition has risen by \\$5,054, or 134%, per student at public universities and \\$2,676, or 138%, at](#)

[community colleges](#) while the state’s need-based scholarship, the Oregon Opportunity Grant, has risen by less than \$1,000. While tuition at Oregon public institutions remains average compared with other state systems, we rank far behind many other states in the amount of aid we provide.

Oregon must develop the investments, policies, and practices that ensure vastly more students and their families perceive higher education to be affordable.

### HECC levers

The HECC is responsible for a variety of policies, programs, and other activities that can impact the affordability of higher education:

- Developing a biennial, consolidated higher education budget recommendation that establishes needs and sets priorities for institutional funding, scholarship funding, and other higher education funding.
- Approving or disapproving requests from public universities to raise resident undergraduate tuition by more than 5% in a single year.
- Within limits set by the statute, determining who receives the Oregon Opportunity Grant (OOG) and on what basis.
- Operating a variety of scholarship and access programs including the OOG, the Oregon Promise, and privately-funded scholarships administered by the HECC.
- Collecting, analyzing, and publishing student, scholarship, and tuition data.
- Annual evaluations of public universities, which may report on institutional efforts to improve affordability through tuition-setting, institutional aid, and increasing student success.
- Convening higher education stakeholders to develop and share best practices for reducing costs.
- Making recommendations for affordability-related programs to the Legislature and Governor.

## Strategies

→ Develop and report annually on a set of affordability measures that can be used to guide policy and to measure progress.

Today's most commonly reported affordability measures fail to provide the public or policymakers with an accurate or comprehensive understanding of the issue. Tuition averages may not reflect the extent to which institutional discounting occurs, and don't reflect living costs that likely constitute the larger financial barrier for many students. Total cost of attendance, while providing a more comprehensive view of the actual costs associated with higher education, fails to take into account discounts, grants, and scholarships that may help offset a significant portion of the cost. Average net price comes closer to reflecting the actual costs that students incur but lacks any way of relating this figure to students' ability to pay.

Average debt comes closest to accurately describing a typical student's financial position upon leaving college, but even this measure isn't very meaningful on its own. Recent data from the U.S. Department of Education shows student debt is inversely related to the likelihood of default: that is, students with lower debt amounts are actually more likely to default on those loans. Whether a student's

\$25,000 debt should be considered more or less affordable depends significantly on what the student can reasonably be expected to earn over a lifetime in the workforce. Did the student earn a degree or other meaningful postsecondary certificate? If so, in what field? For a student to incur \$25,000 of debt to earn a graduate degree in computer science, for example, should concern us much less than if she or he incurred \$25,000 of debt before dropping out of college without any certificate or degree whatsoever. We believe affordability cannot be meaningfully understood independently of factors that profoundly impact students' expectation of their future economic well-being, such as completion rates, time-to-degree,

field and level of degree. No matter how low the price a student may have paid for postsecondary education, if he or she drops out before completing, or completes with a low-quality credential that doesn't confer economic value, it was probably too expensive.

A more robust affordability metric, or set of metrics, will permit the HECC to (a) provide institutions and policymakers with clearer direction and focus as they weigh different strategies for making higher education more affordable; and (b) improve the HECC's approach to designing and implementing financial aid programs for which it is responsible, including the Oregon Opportunity Grant and the Oregon Promise.

→ Support innovations that lower student and family cost while maintaining or increasing quality.

The Commission should continue to seek opportunities to convene higher education partners for the development and sharing of best practices that reduce costs to students. Our recent and ongoing work to improve textbook affordability is one model in that regard. By convening students, faculty, and administrators, the Commission has assessed the extent of the textbook affordability problem, developed recommendations for addressing it, and has begun to implement solutions under authority provided by the 2015 Legislature.

**TABLE 7** Cost of Textbooks Per Term According to Surveyed Students



Source: Textbook Affordability Workgroup: Final Report and Recommendations, May 2015

Likewise, the Commission should continue to assess and support promising practices for structural changes to how postsecondary education is delivered that reduce cost while maintaining or improving academic quality. Competency-based and/or online models, such as Western Governors University, should receive close attention from the HECC given their significant potential for reducing student costs. As long as these models maintain or enhance academic quality, the HECC should use all tools at its disposal to promote their development and spread in Oregon.

**A CLOSER LOOK AT WESTERN GOVERNORS UNIVERSITY'S COMPETENCY-BASED MODEL**

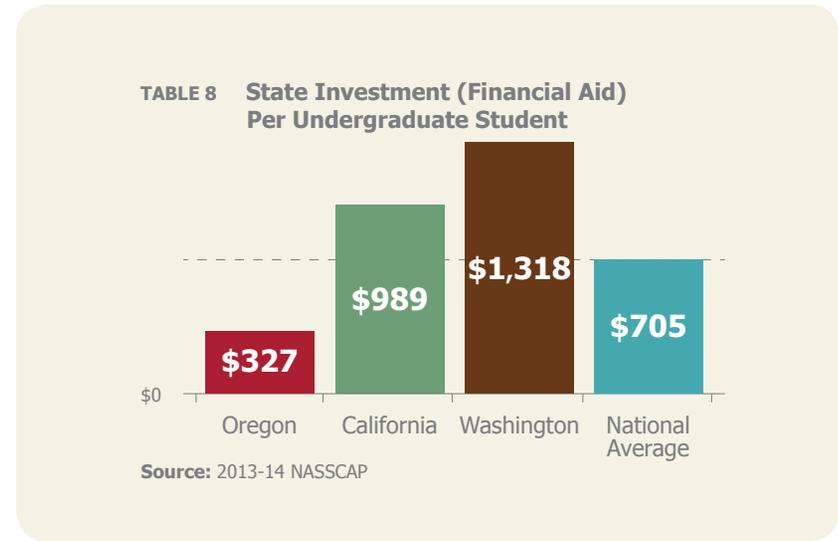
Western Governors University (WGU) is an online, nonprofit college accredited in all 50 states and has been endorsed by 19 governors. It uses a competency-based model that assesses student understanding and mastery of a subject, instead of number of credits to award degrees. This approach gives students an opportunity to shorten time to degree completion and, therefore, can reduce cost of attendance. As Oregon works toward creating a system of higher education that can serve all students—including those that may be constrained by location, work or family schedules—the HECC will continue to monitor programs that apply this model to assess their value.

→ Increase state financial aid to the national average per student

Need-based aid is the Commission's most direct opportunity to improve higher education affordability consistent with our equity commitments. The Oregon Opportunity Grant (OOG) today provides roughly \$70 million annually to Oregon students attending accredited, non-profit public and

private colleges and universities. With maximum awards at slightly more than \$2,000 annually for qualifying full-time students, the OOG plays a critical role in helping high-need students afford the tuition and living costs associated with postsecondary education. By helping students afford college, the OOG also appears to help them complete it: OOG recipients at Oregon public universities have a 4.5% higher graduation rate than non-OOG recipients. The Commission and Legislature's recent work to increase funding for the program (it benefited from a 24% increase in 2015) and to prioritize the state's highest-need students for the award makes the OOG an even more effective instrument for helping realize state goals.

As important a role as the OOG plays today, the program remains significantly underfunded compared to many other state grant programs. The State of Oregon invests \$327 per undergraduate FTE in financial aid, while Washington and California invest \$1,318 and \$989 respectively (2013-14 NASSGAP data). As a result of funding limitations, the OOG in 2016 will primarily support only Oregon's very highest-need students (those with \$0 Expected Family Contribution and perhaps slightly higher)



with maximum award sizes. Even so it will leave these students with sizable gap to make up through borrowing, additional grants or scholarships or supplementing with paid work.

If the Oregon Legislature increased funding for the OOG to the national average of \$705 per student, the HECC could provide significant grant funding to all, or nearly all, eligible students up to the middle-income threshold (\$70,000 AGI) as was envisioned when the OOG was redesigned in 2007.

→ Continue to promote Oregonians' access to the state and federal financial aid system, including through FAFSA and ORSAA completion efforts.

The Free Application for Federal Student Aid (FAFSA) and the Oregon Student Aid Application (ORSAA), an Oregon-based alternative for those who are ineligible to receive federal aid through the FAFSA, are the gateways students must pass to access the federal Pell Grant, the Oregon Opportunity Grant, the Oregon Promise, federal lending programs, and other scholarships and awards.

Through high school partnerships, community outreach events, and data-sharing agreements, the HECC's Office of Student Access and Completion in 2015 helped increase the percentage of students who completed FAFSAs at 42 targeted high schools and other sites by

5% over the prior year. This compared with a 3% decrease at non-participating schools.

The FAFSA and ORSAA are the vehicles through which students receive notification about their eligibility for funding that can help offset or defer the cost of higher education. Without completing the FAFSA, students may not realize that they may be eligible for the federal Pell Grant, for example, which offsets as much as nearly \$6,000 annually of higher education costs. From the standpoint of state policymakers, increasing FAFSA completion rates is a low-cost, high-yield way to significantly increase the amount of federal funding for higher education that flows into the state.

The Commission should continue to promote FAFSA and ORSAA completion efforts.

The Commission should also help connect Oregonians to other federal programs that support the affordability of higher education, including federal tax deductions and credits.

→ Connect young Oregonians to the promise of affordable higher education.

Ultimately, Oregon's success at making higher education more affordable should be measured based on whether young Oregonians and their families at every income level are convinced they will not experience significant financial barriers in pursuit of postsecondary education and career training. The skepticism

that young Oregonians and their families have today about their ability to afford college seems likely to be taking a toll on their motivation to succeed in high school and other pre-college experiences.

This understanding suggests that the Commission should favor approaches to affordability that are relatively simple and come as close as possible to providing students with a "guarantee" of affordability. The potential impact of approaches such as the Oregon Promise should not be underestimated.

However, our work to create the "guarantee" of affordability for young Oregonians should not focus solely on the financial cost-benefit equation of postsecondary education. By supporting the continued development and implementation of well-structured career pathways that begin in high school, which may include work and/or apprenticeships, postsecondary education and training, and culminate with employment, we will significantly enhance the student's experience of higher education as an affordable experience.

## 6 Economic and Community Impact.

Maximize the impact of postsecondary education on Oregonians' economic, civic, cultural, and personal well-being.

### Background

The student is at the center of our goals and strategies for higher education. But increasing Oregonians' access to and success within higher education represents only one side of the equation that will influence their well-being. We recognize that higher education has an equally profound responsibility for shaping the culture, community, and economy into which our students will emerge as graduates, as civic participants, and as job-seekers.

To be sure, the most enduring way that our colleges and universities affect culture, community, and the economy is through the quality and characteristics of the education and training that they impart directly to students. Is the curriculum high quality and relevant to the settings students will encounter in the rest of their lives? Do students grow in their ability to work and live within, and strengthen, diverse communities? Does their experience foster the habits, skills, and dispositions of effective civic participation? Do students gain access to tools that will help them to grow and adapt to rapid changes in the economy and society?

But our postsecondary institutions deeply influence our community and economy in other ways beyond the quality and characteristics of the education they impart to certificate and degree-seeking students. Oregon public universities operate a variety of programs and institutes that support cultural, civic, and economic goals for their local communities and for the state of Oregon. Moreover, faculty at Oregon's research universities, in particular, dedicate significant energy and resources to solving local, regional, and global problems through research and innovation. This activity may occur in conjunction with other public agencies, with policymakers, or with businesses, where the university research brings significant benefit to the external partner.

For their part, community colleges quite literally belong "to the community," with libraries, fairs, cultural and artistic programs, community education courses, high school equivalency and English as a Second Language courses, and business development services (just to name a few) that are made available to the community generally—and not just to students enrolled in credit-bearing courses.

Community colleges, along with other job training organizations, also serve as vital links in a workforce training system designed to respond to local and state workforce needs both immediate (as in the case of significant layoffs by a local employer) as well as long-term. In most communities, community colleges play a foundational role in occupational training. Colleges provide credit Career and Technical Education (CTE) programs as well as non-credit workforce training that prepare Oregonians with the skills for job opportunities in demand occupations and within

**TABLE 9 Oregon Per Capita Personal Income as a Percentage of US Average**



**Sources:** US Department of Commerce Bureau of Economic Analysis (1964-2014 data), Oregon State Office of Economic Analysis (2015-2024 data)

high-growth industries. Colleges provide customized training for employers to help their existing workforce develop skills to better perform in their current jobs and advance in their careers. Colleges regularly engage with regional businesses and align curricula to industry standards to ensure students are prepared to succeed in the workplace. This includes embedding industry credentials within college programming.

Statewide planning and coordination should enhance the impact that our higher education and training partners have directly on Oregon's cultural, civic, and economic future. When it comes to economic development, for example, our efforts in research and workforce development should align with broader state efforts to identify and support key industry sectors such as agriculture, timber, outdoor apparel, and high technology. Opportunities for economically disadvantaged communities and rural economies should be prioritized.

### **HECC Levers**

- Developing state budget recommendations, including capital investments, for public service programs, research/innovation, and workforce development.
- Developing and adopting the formula that guides the allocation of legislatively-appropriated resources to public universities.
- Developing metrics for and reporting on public service, research/innovation, and workforce development outcomes.
- Targeting strategic funding to support public service, research/innovation and workforce development outcomes.

### **Strategies**

→ To support economic development in Oregon and beyond, the HECC will:

- Develop a coherent structure for recommending state investments in research and innovation at

public universities;

- Review and, potentially, modify the Commission's funding distribution formula for public universities to appropriately incentivize and support university research; and
- Consider the creation of a strategic fund—outside of the Public University Support Fund—to provide seed funding for pre-proposal projects and to match federal research awards.

Oregon is fortunate to be home to several universities with significant research agendas and portfolios. At these institutions, researchers are solving problems, making discoveries, and developing innovations that are helping to spur economic growth locally, nationally, and globally. In 2012-13, for example, Oregon State University spent over \$230 million on research and development, with the majority of that funding coming from federal agencies. While there are extensive portions of any university's research portfolio that are not intended to have an immediate or direct industry impact, between 2005 and 2014 OSU researchers were responsible for spinning out 41 start-up companies, generating tens of millions of dollars in licensing revenue, and solving untold number of problems for industries as diverse as bioscience, materials science, computing, and robotics. The story is similar for Oregon's other research universities.

University research also enhances the educational experience of thousands of undergraduate and graduate students. Students who participate in original research, or who are taught by successful academic researchers, gain access to knowledge, skills, and experiences that can be deeply impactful on their own ability to thrive in academia, in their community, and in the broader economy. Research is central to the experience of most PhD candidates, in particular; those students not only represent the future of university and private research, but they

are also responsible for assisting or leading in many of the research projects that are contributing today to Oregon industry.

Though the federal government is the single largest funder of university research, state funding contributes in a variety of ways as well. In addition to research-focused line items within the HECC allocation formula for the Public University Support Fund, the HECC's legislatively-approved budget contains separate line items, totaling \$101 million in 2015-17, for OSU's research-intensive "Statewide Public Services" including its Agriculture Experiment Station, Extension Services, and Forest Research Lab. Additionally, the HECC is responsible in 2015-17 for allocating \$24.5 million in legislatively-approved funds for engineering and technology (formerly these allocation recommendations were made through the Engineering and Technology Industry Council- ETIC), some of which supports productive research activities in those fields. The HECC must make recommendations for state-funded capital projects at public universities including, potentially, building projects that are focused on research capacity. Finally, there are several key state investments *outside* of the HECC budget that are intended to foster industry innovation and success through, in part, university research. In 2015-17, these include \$17.9 million for the Oregon Innovation Council (Oregon InC), administered by the Oregon Business Development Department (Business Oregon), and \$6.1 million for the Oregon Council Talent Fund, administered by the Employment Department.

This strategy suggests three activities related to state funding for university research. First, beginning with the HECC's 2016 budget recommendation for the 2017-19 budget and culminating no later than its recommendation for the 2019-2021 biennium, the Commission should develop a more logical budget structure and rationale for state investments in university research. Budget recommendations should reflect a coherent plan, not merely reflect a continuation of decisions over many decades. Simultaneously, the Commission should evaluate and adjust the "research" component of the Public University Support Fund to provide incentives for new research and to reward research

productivity. Finally, it should consider the creation of a strategic fund—outside of the Public University Support Fund—to provide seed funding for pre-proposal projects and to match federal research awards.

→ To support economic development in Oregon and beyond, the HECC will collaborate with other partners, including the Oregon Workforce Investment Board (OWIB), to:

- Select specific metrics that can help focus the HECC's workforce development efforts;
- Develop a coherent structure for recommending and deploying federal and state investments in workforce development; and
- Promote deeper collaboration and partnership within the larger workforce system.

To contribute to building the robust and resilient economy that can empower a "virtuous cycle" of prosperity, the HECC must work with its public and private partners to align our workforce investments with the state's broader economic development strategies, including support for key industry clusters and for regional sector initiatives.

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The HECC should partner with the Oregon Workforce Investment Board and the Oregon Talent Council to ensure that state and federal workforce investments are deployed in concert with our shared goals for economic development in Oregon.

The HECC's workforce development strategies and investments should be organized around a core set of specific measures that span the education and workforce systems. Oregon's Performance Reporting Information System (PRISM) provides a wealth of opportunity in this regard, as it combines information on individuals served by Oregon's workforce system with quarterly tax reports provided by Oregon businesses to determine whether those served by the system are successful in their quest for good jobs. By drawing from this data and other reports on workforce outcomes, the HECC should more effectively develop budget and policy proposals that improve workforce outcomes.

HECC staff, including those from its Office of Community College and Workforce Development, supports the Oregon Workforce Investment Board (OWIB) to develop and implement a state plan for federal and state investments in workforce development, makes grants to local workforce investment boards and training providers in accordance with the plan, and monitors and supports the local boards and providers to ensure they are fully compliant with federal requirements and the state plan. State funding for specific workforce development activity has been limited and focused on particular activities; for example, allotting \$10.9 million from the general fund in 2015-17 for the Back to Work Oregon (on-the-job training) and National Career Readiness Certificate programs, alongside other specific efforts. The HECC should partner with the Oregon Workforce Investment Board and the Oregon Talent Council to ensure state and federal workforce investments are deployed in concert with our shared goals for economic development in Oregon.

Finally, community colleges are part of a larger workforce system that includes local Workforce Boards, the Oregon Employment Department, Worksource Oregon, the Department of Human Services, and community-based organizations. Colleges provide key CTE programs in these partnerships and are able to leverage district and federal Perkins funds to support workforce needs. Colleges also provide key services to small businesses across the state via the Small Business Development Centers. Additionally, colleges provide pre-apprenticeship and apprenticeship

collaborative programs, on-the-job training opportunities, adult basic skills (ABS, which includes GED and English as a Second Language programs) and career services for students. All of these programs/opportunities are community-based and community-supported and once again are foundational for the work of HECC and OWIB in any local community. These partnerships should be strengthened and supported.

→ The HECC will make investments that support higher education's unique role in promoting the cultural and civic vitality of Oregon.

Educational, cultural, and community-oriented programming at our colleges and universities play a key role in enhancing the cultural and civic vitality of the state. As the HECC makes budget recommendations and funding allocation decisions, it will acknowledge and bring attention to these important contributions. The Commission will pay particular attention to the various community-oriented institutes and programs that receive explicit support within the HECC's budget, such as Oregon Solutions at Portland State University (PSU), Clinical Legal Education at University of Oregon (UO), The Oregon Office for Community Dispute Resolution at UO, Regional Solutions at Eastern Oregon University, OSU, PSU, and UO, and NEW Leadership Oregon at PSU. Beginning with the HECC's 2016 budget recommendation for the 2017-19 budget and culminating no later than its recommendation for the 2019-2021 biennium, the HECC should develop a more logical budget structure and rationale for state investments in community-oriented institutes and programs.

# Appendix A: Glossary and Key

## **40-40-20 Goal**

Under ORS 350.014, the Legislature declares that the mission of all education beyond high school in Oregon includes the achievement of the following by 2025:

- 40 percent of adult Oregonians have earned a bachelor's degree or higher;
- 40 percent of adult Oregonians have earned an associate's degree or postsecondary credential;
- 20 percent of all adult Oregonians have earned at least a high school diploma, an extended or modified high school diploma, or the equivalent of a high school diploma.

## **Accelerated learning models**

Accelerated learning models are educational experiences that provide high school students with the opportunity to earn college credit while in high school. These educational experiences may occur at a college/university or as part of the high school program. In many cases, students earn both high school and college credit. Accelerated learning takes many forms in Oregon, including: high school students taking courses at the college/university independently or as part of Expanded Options or other programs, Dual Credit and Advanced Placement courses.

## **Accelerated learning programs**

Accelerated learning programs are credit-based transition opportunities offered by institutions of higher education, often through partnerships with high schools, that enable students to earn college credit while in high school. Accelerated learning programs utilize dual or concurrent enrollment or other early college credit opportunities. This does not include courses that students take directly from the college/university

while in high school, whether by coming to the college/university or having college/university faculty teach the course at the high school.

## **Adjunct faculty**

Adjunct faculty are instructors who are typically hired by schools on a contractual, part-time, or full-time basis, as opposed to the traditional university model of full-time employment, tenure-track professors.

## **Agency Request Budget (ARB)**

The Agency Request Budget is developed every biennium, beginning the first half of even-numbered years. The ARB outlines agency finances and policies for consideration by the Governor. The Chief Financial Office (CFO) provides guidelines for agencies to use in this process. Agencies send their budget request to the CFO by September 1. The HECC's responsibility is to develop and submit to the Governor a comprehensive and integrated higher education budget request, including state funding for Oregon's 17 community colleges and 9 Local Workforce Investment Boards, Oregon's 7 public universities and the Oregon Health & Science University (OHSU), state need-based aid and student access programs, and HECC agency operations and offices.

## **Associate of Applied Science Degree (AAS)**

The Associate of Applied Science Degree is a state approved associate degree that is intended to prepare graduates for direct entry into the workforce. An AAS may also help to prepare students for career advancements, occupational licensures, or further study at the baccalaureate degree. The AAS is typically a two-year undergraduate degree offered at most community colleges, technical colleges and vocational schools, and some bachelor's degree-granting colleges and universities and is earned through Career and Technical Education (CTE).

## **Average costs**

In economic terms, the average cost of a unit is the total cost divided by the number of units produced. Average cost can be considered both as an overall number or as average cost for a certain type of output.

## **Career and Technical Education (CTE)/CTE Certificate**

Career and Technical Education provides opportunities for students to develop technical skills while still in high school and into college. Currently, federal Carl Perkins funds help guide the design for alignment and articulation between secondary and postsecondary CTE offerings. With an articulated program design, the goal of CTE courses is to connect secondary and postsecondary CTE through a non-duplicative, sequential course of study that ensures students will gain both academic and technical knowledge and skills, which articulate to additional education and/or training. Through curriculum development, instruction and assessments, students are able to gain and demonstrate academic and career technical knowledge and skills.

## **Career Pathways**

Career pathways are linked education and training services and student supports that enable individuals, often while currently working, to secure industry relevant certification and advance over time to higher levels of education and employment in a given occupation or industry sector. Career Pathways offer more than 450 Career & Technical Education (CTE) short-term certificates for students and workers across Oregon. These certificates are aligned to entry-level jobs or job advancement competencies identified by local employers. Career Pathways prepare students for middle-skill occupations that require more than a high school degree but less than a four-year degree.

## **Chancellor's Office**

The Chancellor served as the executive officer for the State Board of

Higher Education and the Oregon University System. The Chancellor and the Chancellor's Office exercised administrative and management authority to carry out the directives of the State Board with respect to Oregon's public universities. The State Board of Higher Education and the Chancellor's Office were abolished as of July 1, 2015.

## **Chief Education Office (CEdO)**

*(formerly the Oregon Education Investment Board)*

The Chief Education Office is the state agency dedicated to coordinating a seamless education system from birth through college to career, bringing strategic leadership and coordination to the work of education agencies and community partners. The CEdO focuses on outcomes and removing barriers, recommends research-driven policy, promotes best practices, convenes stakeholders to find solutions, elevates community assets, and drives cross-sector engagement, all with an underlying commitment to equity.

## **College Navigator**

The College Navigator, compiled by the U.S. Department of Education, the Institute of Education Sciences, and the National Center for Education Statistics, is a tool that consolidates performance information submitted by universities into one easily accessible and searchable resource. The College Navigator provides information including tuition and cost of attendance, accreditation information, financial aid statistics, graduation and transfer rates, student loan default rates, and other general information on programs, admissions criteria, faculty numbers, and school links.

## **College Scorecard**

The College Scorecard, established in 2013 by the U.S. Department of Education, is an interactive resource that provides students and families the information needed to make informed decisions about where to enroll for higher education. The College Scorecard lets students and families choose among any number of options based on individual

needs, including location, size, campus setting, and degree and major programs, highlighting key indicators and comparisons about the cost and value of institutions across the country.

### **Equity Lens**

Designed to be a frequently-used resource, the Equity Lens is a tool developed by the Chief Education Office and approved by the HECC in 2014 to guide policy and funding decisions with a focus on equity. It provides a common vocabulary and protocol for resource allocation and evaluating strategic investments in education, with a particular focus on underserved students, racial equity, and the importance of recognizing institutional and systemic barriers and discriminatory practices that have limited access for many students in the Oregon education system. With feedback from organizations and individuals throughout the state, the Equity Lens identifies a list of vetted core beliefs and a set of questions to consider when discussing resource allocation and evaluating investments.

### **Free Application for Federal Student Aid (FAFSA)**

The Free Application for Federal Student Aid is an online federal form that prospective and current students complete to apply for the federal government's largest source of student financial aid (the Pell Grant) as well as federal student loans and work study funding. Continuing students submit the FAFSA each year. The college or career school uses information from the FAFSA to package and award financial aid, including grants, scholarships, work-study funds, and loans.

### **Funding and Achievement Subcommittee (F&A)**

The Funding and Achievement (F&A) subcommittee is one of two subcommittees of the Higher Education Coordinating Commission that meets publicly on a regular basis to address work and initiatives related to institutional funding, including budget recommendations and funding allocation. The work of the subcommittee is reported or advanced to the full Commission.

### **General Educational Development (GED)**

General Educational Development is a set of tests covering basic subject areas including reading, writing, math, science, and social studies. When successfully completed, the GED® text credential certifies that the test taker has met high school level academic skills. The Oregon GED® program is administered by the Higher Education Coordinating Commission Office of Community Colleges and Workforce Development and GED® serves as a bridge to higher education, trade schools, apprenticeship programs, and employment opportunities for Oregonians without a high school credential.

### **Liberal Education and America's Promise (LEAP)/ Association of American Colleges and Universities**

Launched in 2005, Liberal Education and America's Promise is a national public advocacy, campus action, and research initiative of the Association of American Colleges and Universities (AAC&U). LEAP champions the importance of a twenty-first-century liberal education by promoting essential learning outcomes, principles of excellence, high-impact educational practices, authentic assessments, and student signature work.

The Association of American Colleges and Universities is a national association concerned with the quality, vitality, and public standing of undergraduate liberal education. Founded in 1915, AAC&U now comprises more than 1,300 member institutions, including accredited public and private universities, community colleges, and research universities. Through publications, meetings, public advocacy, and programs, the AAC&U focuses on four goals: LEAP, quality, equity, and social responsibility.

### **Marginal costs**

In economic terms, marginal cost is the cost incurred when producing one additional unit of output above that which is already being produced.

## **National Association of State Student Grant and Aid Programs (NASSGAP)**

The National Association of State Student Grant and Aid Programs (NASSGAP) is an organization dedicated to the promotion, strengthening, encouragement, and enhancement of high standards in the administration and operation of student grant and aid programs. NASSGAP works to ensure these programs are available to students in all states in order to expand and further postsecondary educational opportunities. NASSGAP's membership is drawn from single agencies in each state which are responsible for state-funded student aid programs. The Higher Education Coordinating Commission Office of Student Access and Completion represents Oregon in NASSGAP.

## **Oregon Department of Education (ODE)**

The Oregon Department of Education is the state agency that oversees Oregon's public K-12 education system, including local school districts, charter schools, early learning programs, the state School for the Deaf, regional programs for children with disabilities, and education programs in Oregon youth correctional facilities. In conjunction with the Oregon State Board of Education, ODE helps Oregon school districts achieve local and statewide goals and priorities. The Governor serves as the superintendent of schools and appoints a deputy to lead the work of the ODE.

## **Oregon Employment Department (OED)**

The Oregon Employment Department is the state agency dedicated to developing the workforce of Oregon. Through 47 offices across the state, the OED serves job seekers and employers by helping workers find suitable employment; providing qualified applicants for employers; supplying statewide and local labor market information; and providing unemployment insurance benefits. The HECC Office of Community Colleges and Workforce Development works in close partnership with OED.

## **Oregon Opportunity Grant (OOG)**

Begun in 1971, the Oregon Opportunity Grant, originally the State Need Grant, is the State of Oregon's primary source of need-based student financial aid. Since it is a grant, it does not need to be repaid. Students who receive the grant can use it at any eligible Oregon college or university for any education-related expenses. Oregon students apply for the grant automatically when they complete a Free Application for Federal Student Aid (FAFSA) or Oregon Student Aid Application (OR-SAA). Students must reapply each year.

## **Oregon Promise**

Passed by the Oregon Legislature and signed by the Governor in 2015, the Oregon Promise assists recent high school and GED graduates by paying most or all of their community college tuition, in conjunction with other grant aid. Since it is a grant, it does not need to be repaid. Students who receive the grant can use it at any eligible Oregon community college. Oregon students may view eligibility requirements and apply for the grant via an online application at [oregonpromise.org](http://oregonpromise.org). They must also provide an appropriate high school transcript or GED certification and file the Free Application for Federal Student Aid (FAFSA) or Oregon Student Aid Application (ORSAA). Students must reapply each year.

## **Oregon State Board of Education (SBE)**

The Oregon State Board of Education oversees and sets policies and standards for the state's K-12 education system, including 197 school districts and 20 educational service districts in Oregon, which have separate governing bodies. The SBE helps school districts achieve both local and statewide goals and priorities. The SBE is comprised of seven members appointed by the Governor and confirmed by the State Senate and holds regular public meetings. The SBE works in conjunction with the Oregon Department of Education (ODE), the state agency that oversees Oregon's public K-12 education system.

## **Oregon Student Aid Application (ORSAA)**

The Oregon Student Aid Application is the state approved financial aid application for students who are not eligible for federal financial aid programs. The ORSAA serves as an alternative to the Free Application for Federal Student Aid (FAFSA) for students applying for the Oregon Opportunity Grant or Oregon Promise.

## **Oregon University System (OUS)**

The Oregon University System was the official name for the public university system in Oregon when it was governed by the Oregon State Board of Higher Education (SBHE). The OUS Chancellor's Office was the administrative office that carried out the directives of the SBHE for the public university system. It was led by the Chancellor who was appointed by the SBHE. The SBHE and the OUS Chancellor's Office were abolished as of July 1, 2015.

## **Oregon Workforce Investment Board (OWIB)**

The Oregon Workforce Investment Board (OWIB) is a 34-member board made up of leaders representing private, business, labor, community-based organizations, the Oregon Legislature, local government, and state agencies. Members of the OWIB are appointed by the Governor under the Workforce Innovation and Opportunity Act and advise the governor on workforce policy and plans. The OWIB contributes to the economic success of Oregon by aligning state workforce policy and resources with education and economic development; promoting a proactive, flexible and innovative talent development system; and coordinating an accountable workforce system focused on results to ensure Oregonians develop the skills they need to sustain rewarding careers and businesses have the talent they need to be competitive.

## **Pell Grant**

A Pell Grant is federal financial aid that does not need to be repaid and

is awarded to undergraduate students who have not completed a bachelor's or professional degree. Award amounts depend on financial need, cost of attendance, full-time or part time student status, and academic year attendance (full year or partial year). Students apply for Pell Grants by completing the Free Application for Federal Student Aid (FAFSA).

## **Pipeline**

The educational "pipeline" refers to the population of students transitioning through educational stages, from early learning through K-12 through postsecondary education to career, typically advancing in age related cohorts through high school, and from then in a variety of ways based on skill, financial ability and interest. In higher education, the term pipeline is often used in efforts build a coordinated system of pathways, access, and academic preparation to best prepare students for success in postsecondary education and beyond.

## **Public University Support Fund (PUSF)**

The Public University Support Fund is the General Fund appropriation to the HECC intended for distribution by the HECC to public universities as defined in ORS 352.002. The HECC distributes PUSF monies using the Student Success and Completion Model (SSCM).

## **Regional Achievement Collaborative Initiative (RAC)**

Launched by the Chief Education Office (formally the Oregon Education Investment Board) in 2013, the Regional Achievement Collaborative (RAC) initiative forges connections between PK-16 schools, colleges, universities, community organizations, businesses and local leaders to drive communities to actively support improving education outcomes beyond the classroom. RAC members work with their community to review local achievement data, identify underlying problems that impede education, focus on collective impact strategies to boost educational outcomes, coordinate regional communication and partnerships, improve key student outcomes, build capacity and sustainability for

change, and encourage and supporting local and statewide multi-sector engagement.

### **Shared Responsibility Model (SRM)**

First implemented in 2007, the Shared Responsibility Model is a higher education cost-sharing methodology for calculating a student's Oregon Opportunity Grant based on the philosophical premise that financing the cost of a student's education is a "shared responsibility" of the student, the student's family, the federal government and the government of the State of Oregon. The student's share includes income from work, savings and loans (in some cases); the family share includes any Expected Family Contribution as calculated via the Free Application for Federal Student Aid (FAFSA) or Oregon Student Aid Application (ORSAA); and the federal share includes any anticipated Pell Grant and/or federal income tax credits. The state share is calculated as the student's total cost of attendance (tuition, fees, books, transportation, room & board, miscellaneous), less the respective shares of the other participants. The Oregon Opportunity Grant was to represent the state's share under SRM, but limited funding for the grant has led to grants significantly smaller than the calculated state share.

### **State Board of Higher Education**

The Oregon State Board of Higher Education was the governing board for Oregon's public universities, and was abolished as of July 1, 2015. Beginning on July 1, 2014, Oregon State University, Portland State University, and University of Oregon became governed by governor-appointed institutional boards of trustees. Beginning July 1, 2015, Eastern Oregon University, Oregon Institution of Technology, Southern Oregon University, and Western Oregon University became governed by governor-appointed institutional boards of trustees.

### **Student Success and Completion Model (SSCM)**

The Student Success and Completion Model (SSCM) is a method by

which funding from the Public University Support Fund (PUSF) is distributed to the seven Oregon public universities as listed in ORS 352.002. The SSCM provides a rational and structured funding system which focuses the state's investment in the PUSF on access and completion of resident students, with particular emphasis on those students which are hardest to reach and in areas of critical need for the state. The SSCM divides the PUSF into three parts for fund allocation purposes: mission differentiation, activity-based (student credit hour), and completion funding. The SSCM serves as an evolutionary change to the Resource Allocation Model (RAM), in effect from 1999 to 2016, which distributed state resources based purely on Mission Differentiation and cost-weighted enrollment. The RAM components are included, largely unaltered within the SSCM, with the addition of funding designed to incentivize and reward institutional focus on support and completion of resident students, particularly those that have been historically under-served and those graduating in high-demand and high-reward fields.

### **Student Success and Institutional Collaboration (SSIC) HECC Subcommittee**

The Student Success and Institutional Collaboration (SSIC) subcommittee is one of two subcommittees of the Higher Education Coordinating Commission that meets publicly on a regular basis to address work and initiatives related to student success topics. The work of the subcommittee is reported or advanced to the full Commission.

### **Student Success Oversight Committee (SSOC)**

The Student Success Oversight Committee (SSOC) was created in October 2007 as the Oregon Community College Student Success Steering Committee. This group, made up of faculty, administrators and executives from the state's community colleges as well as agency staff produced the Oregon Community Colleges Student Success Plan, Measure What You Treasure, in September 2008. This group, in partnership with the Oregon Community College Association, continues as a forum for

Oregon's community colleges to collaborate on student success strategies and share best practices.

### **Voluntary Framework for Accountability (VFA)**

The Voluntary Framework for Accountability is the principal accountability structure for community colleges with measures defined to encompass the full breadth of the community college mission and the diversity of students' goals and educational experiences. The VFA has three components: measures of student progress and outcomes; measures of workforce, economic, and community development; and an approach for assessing student learning outcomes. Developed by a steering committee and working groups comprised of more than 60 college presidents, accountability leaders, workforce development professionals, trustees, and institutional researchers, the VFA is designed as a set of appropriate measures to determine how well community colleges are serving students.

### **Western Governors University**

Western Governors University was founded by 19 U.S. governors and incorporated in 1997 as a private, non-profit university. WGO offers self-paced online courses that students advance through as soon as competency can be demonstrated through assessments, earning bachelor's or master's degrees in a teaching, business, information technology, or health professions.

# Appendix B: The HECC's Role in Oregon's Higher Education

## Oregon's Higher Education Institutions

INSTITUTION TYPE	NUMBER OF INSTITUTIONS	2013 ENROLLMENT (FTE)*	PRIMARY HECC RESPONSIBILITIES
Oregon public universities	7	85,726	Funding allocations, state budget development, program approval, mission approval, coordination
Oregon Health and Sciences University	1	2,452	Coordination
Oregon community colleges	17	72,113	Funding allocations, state budget development, program approval, coordination
Oregon-based private, degree-granting schools	27 (state regulated)	8,990	Degree authorization, coordination
	22 (exempt)	35,498	Coordination
Oregon-based private career schools (non-degree granting)	198	4,040	Licensure, teacher registry, coordination
Non-Oregon degree-granting schools (distance education)	115 (state regulated)	NA	Degree authorization, coordination
	114 (exempt)	NA	Coordination

\*For the sake of consistency, enrollment data is drawn from the National Center for Education Statistics IPEDS database. This represents a significant undercount, as it does not include: (a) students attending institutions that do not participate in federal financial aid programs; and (b) many students attending community colleges who are enrolled in non-credit and other courses.



## Appendix C: Acknowledgements

This plan captures the pioneering spirit of Oregon's policy, higher education, workforce development, and preK-12 education leaders to chart a path towards postsecondary educational success that can position Oregon to be competitive in this global marketplace.

### **Partners include:**

Office of the Chief Education Officer  
Oregon Department of Education  
State Board of Education  
Oregon Workforce Investment Board  
Oregon Community College Association  
Oregon Presidents' Council (community colleges)  
Public Universities Presidents' Council  
Inter-Institutional Faculty Senate  
Oregon Education Association  
Oregon Student Association  
Oregon Alliance of Independent Colleges and Universities