



Oregon Solutions Declaration of Cooperation
Technical Regional University + Portland State University
Financial Sustainability Project
January 18, 2024

I. Project Snapshot

Eastern Oregon University, Oregon Institute of Technology, Portland State University, Southern Oregon University, and Western Oregon University are facing financial pressure based on changing demographic and economic variables. There are fewer 18-24 year olds in Oregon. These universities, collectively known as the technical and regional universities + Portland State (or the TRU+ universities); their students, staff, and faculty; and the Higher Education Coordinating Commission (HECC) came together to prioritize investments in actions that will foster the long term financial sustainability of the TRU+ universities in ways that also ensure equitable student success.

HECC's 2023-25 budget bill (HB 5025) allocated \$6,164,482 one-time General Fund and \$18,735,518 special purpose appropriation to the Emergency Board for potential HECC grants to assist the TRU+ universities with long term financial sustainability. Oregon is one of the only states to proactively invest in helping its TRU+ universities adapt to changing demographic and economic realities. A project team recommended an allocation approach for that \$18,735,518 that included:

- Predictable criteria tied to legislative intent, demographic and economic reality, and the needs of students;
- A review process for proposed projects;
- Ways to support ongoing collaboration across all five TRU+ universities; and
- An equitable allocation of funds across TRU+ universities.

II. Process Description

A project team of the key parties was convened through Oregon Governor Tina Kotek's designation of an Oregon Solutions project for the purposes of establishing a unified approach to the use of these funds. Oregon Solutions (OS) is a program of the National Policy Consensus Center at Portland State University. The mission of Oregon Solutions is to develop solutions to community based problems that support sustainable objectives for the economy, the community, and the environment and are built through the collaborative efforts of citizens, businesses, government, and non-profit organizations. The OS approach provides an impartial forum – a place where various interests can

come together as a “Project Team,” in a manner that is more neutral than a meeting sponsored or hosted by one of the parties at the table.

The agreements formed during the collaborative work of an Oregon Solutions project are documented in the Declaration of Cooperation (Declaration). The Declaration, including the voluntary stakeholder commitments, is considered to be a “living” document to guide implementation that may evolve with the opportunities for parties to amend by unanimous consent from time to time, to represent changing situations often found during project development, until project completion or until suspended by mutual agreement.

III. Project Background

In August 2023, the TRU+ universities requested that Oregon Solutions support their work as part of a HECC-convened workgroup to recommend long term financial sustainability investments. That workgroup would include several members of each of the five TRU+ university’s administration staff, representatives of statewide student, staff, and faculty unions/associations, and staff from HECC. This project was unusual for Oregon Solutions because of the tight timelines facing the workgroup. The Legislature requested a report in time to release the \$18.74 million at its February 2024 short session. Oregon Solutions completed its Assessment Report in August while helping an early version of the project team further define its purpose, draft investment criteria, and potential collaborative investments. In talking with TRU+ staff, HECC, the Governor’s office, key Legislators, and student/staff/faculty associations, Oregon Solutions assessment found that:

- The universities and HECC want to collaborate, and want a designation;
- A Governor’s designation would provide facilitative support for meaningful collaboration between the universities, HECC, students, staff, and faculty resulting in creative and transformative ideas for fiscal sustainability for the TRU+ universities; and
- Funding has been committed from Portland State for this project, and potential conveners have been identified.

Oregon Solutions recommended that the TRU+ Financial Sustainability project be designated as an Oregon Solutions project, and Governor Kotek designated the project in November 2023– naming Cam Preus as convener.

The project team met twice a month between August 15, 2023 and January 18, 2024. Oregon Solutions facilitated the project team meetings and helped the project team work through differences and solutions. The team:

- Defined a shared purpose and crafted a group charter to guide consensus seeking;
- Guided the TRU+ university’s meaningful engagement with campus students, staff, and faculty;

- Received information from the TRU+ universities via a report on December 15, 2023 on proposed project investments generated through that engagement;
- Received recommendations from the National Center for Higher Education Management Systems ([NCHEMS](#)), via a draft report on Jan 5, 2024, based on analysis of each TRU+ university's financial position;
- Negotiated substantive differences in interpretation of legislative intent, visions for the kinds of projects to invest in, and the process for evaluating and selecting project investments; and
- Reached consensus on criteria and investment assessment approach, including next steps for transitioning from the workgroup to a HECC-facilitated assessment team.

IV. Project Outline

The specific recommendations for the project are included in a final report prepared by NCHEMS and included HECC's staff recommendation. The TRU+ university project concepts were also included in HECC's staff recommendation. HECC staff's recommendation to their Commission on requesting the \$18.74 million can be found online for the January 19, 2024 special meeting materials, [currently housed here](#).

The project team agreed to implement the following investment allocation approach (the dates included are target dates and not requirements):

- HECC to request that the Legislature release the remaining \$18.74 million from the Special Purpose Appropriation within HB 5025 for the purpose of grants to the TRU+ universities (by early February, 2024).
- The TRU+ universities to amend their December 15 project concepts, as needed, and submit revised concepts for consideration by a representative assessment team (by late February, 2024).
- HECC convenes and facilitates the assessment team made up of one representative from each of the TRUs, PSU, the Oregon Student Association, and the Interinstitutional Faculty Senate; one member representing the Service Employees International Union, American Federation of Teachers, and the American Association of University Professors); and 1-2 external reviewers (by early March, 2024 / just after Legislative funding approval).
- The assessment team reviews project concepts and reviews subsequent full project proposals, and recommends project investments to HECC staff. At the same meetings of the assessment team, HECC staff will review project concepts for collaborative opportunities and technical alignment with state law and funding requirements (early March to mid May, 2024; and beyond for projects that need more information and time).
- HECC finalizes grant agreements and distributes funds to TRU+ universities on a rolling basis with the first distribution expected no later than June 30, 2024.

- The assessment team may reconvene once a year, facilitated by HECC, to review progress, learn, and adapt the investment approach as needed (by June 30 of each year).

V. Commitments

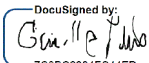
This Declaration of Cooperation, while not a binding legal contract, is evidence to, and a statement of, the good faith and commitment of the undersigned parties. The undersigned parties to this Declaration of Cooperation have, through a collaborative process, agreed and pledged their cooperation to the following findings and actions:

A. Convener Camille Preus, EdD

Preus has acted as the Convener for the TRU+ Financial Sustainability Project at the request of Governor Kotek. She has a strong interest in the success of this project. She has a long term interest in student success, and creating the opportunity for all Oregonians to thrive - no exceptions.

In support of the Project, Dr. Preus commits to the following:

- Support and advocate for the Project within her professional and personal networks, whenever an opportunity arises to do so with individuals or organizations in a position to offer assistance
- Participate, when her schedule permits, in a re-convening of the Workgroup or Assessment Team
- Confer or consult informally with Project partners or Oregon Solutions if requested

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Cam Preus

Oregon Solutions Convener

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B. Higher Education Coordinating Commission (HECC)

HECC's strategic roadmap for Oregon postsecondary education and workforce training takes a holistic view of Oregon's postsecondary system, anticipating the changes that will be required in order to meet state goals for increased access, affordability, attainment, and equity. The roadmap has implications not only for the HECC, but also for its many partners including the Legislature, Governor, public and private colleges and universities, other education and training partners, as well as faculty, students, and staff.

The HECC believes robust and financially sustainable public institutions of higher education will be needed to support these goals. The goal of this funding is to support the TRUs and PSU as they look to become more fiscally sustainable in the future. The HECC remains committed to collaborating with the universities in this endeavor.

HECC commits to the following:

- Request the Legislature release the remaining \$18.74M Special Purpose Appropriation to HECC for use in grants to the TRU+ universities
- Convene and facilitate an assessment team to review project concepts and full project proposals using the criteria and process agreed to by the workgroup and described in the NCHEMS report
- Conduct a review of the assessment team's recommended investments for A) opportunities for further collaboration across the five TRU+ universities, and B) consistency with the requirements of the funding established by the Legislature
- Distribute grants for assessment team-recommended investments

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Ben Cannon
Higher Education Coordinating Commission Executive Director

C. Eastern Oregon University (EOU)

Designated as Oregon’s Rural University, Eastern Oregon University is committed to serving students and the educational needs of people throughout the state with a special focus on underserved regions. President Kelly Ryan and her leadership team, along with the Board of Trustees, faculty, students, and staff, are actively participating in leading the university into a healthy and sustainable future. University-wide Strategy Teams are finding efficiencies and shaping new initiatives while innovative new programs, responsive to the needs of the region and state, are building enrollments and supporting economic prosperity through community engagement and hands-on learning for students. Collaborative projects with community colleges and strong partnerships with Oregon's other public universities are helping each of our institutions to better support the students we are here to serve.

EOU commits to the following:

- Submit project concepts and full project proposals to support the long term financial sustainability for A) EOU, and B) all five of the TRU+ universities
- Commit staff time to actively participate in the assessment team to review the proposals of other TRU+ universities and collaborative projects
- Implement projects that move toward long term financial sustainability consistent with the criteria established by the workgroup and described in the NCHEMS report
- Collect information on the outcomes, progress, and learning to share with the assessment team once a year to support ongoing learning and adaptation

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Kelly A Ryan

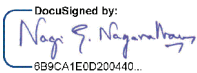
Eastern Oregon University President

D. Oregon Institute of Technology (OIT)

Oregon Institute of Technology (“Oregon Tech”) is committed to a prosperous future for the state’s public polytechnic university. Oregon Tech’s leadership, including the Board of Trustees, President, and senior staff, work closely with the campus community to address issues of financial sustainability in a collaborative, student-centered manner. The financial sustainability funds will allow Oregon Tech to strengthen its financial position by improving retention, creating pipelines for Oregon high school and community college students, maximizing efficiencies, and better understanding the state’s workforce needs.

OIT commits to the following:

- Submit project concepts and full project proposals to support the long term financial sustainability for A) OIT, and B) all five of the TRU+ universities
- Commit staff time to actively participate in the assessment team to review the proposals of other TRU+ universities and collaborative projects
- Implement projects that move toward long term financial sustainability consistent with the criteria established by the workgroup and described in the NCHEMS report
- Collect information on the outcomes, progress, and learning to share with the assessment team once a year to support ongoing learning and adaptation

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Nagi G. Naganathan

Oregon Institute of Technology President

E. Portland State University (PSU)

Portland State University continues to face a challenging budget environment with annual reductions driven, by a projected continued decline in overall enrollment and a continued increase in expenses, as we strive to meet the unique needs of our shifting student demographics. PSU is on a journey this year to develop a dynamic strategic plan that will guide our collective work for the near future. The strategic planning process will take us through the end of this fiscal year and strategies developed will inform our budget conversations starting in the 2024-25 fiscal and academic year. The financial sustainability funds offer PSU an opportunity to test and implement potential innovative, collaborative solutions that may yield a path to a long-term, stable financial future for PSU to continue serving the state as Oregon's urban research university.

PSU commits to the following:

- Submit project concepts and full project proposals to support the long term financial sustainability for A) PSU, and B) all five of the TRU+ universities
- Commit staff time to actively participate in the assessment team to review the proposals of other TRU+ universities and collaborative projects
- Implement projects that move toward long term financial sustainability consistent with the criteria established by the workgroup and described in the NCHEMS report
- Collect information on the outcomes, progress, and learning to share with the assessment team once a year to support ongoing learning and adaptation

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Ann E Cudd

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Ann E. Cudd
Portland State University President

F. Southern Oregon University (SOU)

SOU in the last 18 months, has made substantial strides toward financial sustainability, including our SOU Forward plan, which cut 83 positions and has the recurring impact of a \$9M recurring savings. These financial sustainability one-time funds will allow SOU to continue to bend the cost curve by investing in critical IT student-facing systems that will reduce recurring licensing costs and support internal communications needs to aid in student access, recruitment, and retention. We also look forward to further collaboration and helping to build a more robust framework for financial sustainability for all institutions and a roadmap for future financial sustainability.

SOU commits to the following:

- Submit project concepts and full project proposals to support the long term financial sustainability for A) SOU, and B) all five of the TRU+ universities
- Commit staff time to actively participate in the assessment team to review the proposals of other TRU+ universities and collaborative projects
- Implement projects that move toward long term financial sustainability consistent with the criteria established by the workgroup and described in the NCHEMS report
- Collect information on the outcomes, progress, and learning to share with the assessment team once a year to support ongoing learning and adaptation

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Richard J. Bailey Jr.
Southern Oregon University President

G. Western Oregon University (WOU)

Over the past two academic years, Western Oregon University has made substantial progress in financial sustainability. Guided by President Peters and a Senior Leadership Council consisting of newly appointed members, the university is actively seeking methods to reduce expenses and enhance its visibility to new opportunities. These opportunities are aimed at providing enduring support to our students, faculty, and staff. Throughout this process, Western Oregon has upheld a commitment to transparency and inclusion. Additionally, the university remains dedicated to the collaborative ethos shared among all five institutions involved since the establishment of these funds, as well as in our advocacy efforts at the legislature. Western Oregon looks forward to continuing this work in a manner that ensures the success of our students.

WOU commits to the following:

- Submit project concepts and full project proposals to support the long term financial sustainability for A) WOU, and B) all five of the TRU+ universities
- Commit staff time to actively participate in the assessment team to review the proposals of other TRU+ universities and collaborative projects
- Implement projects that move toward long term financial sustainability consistent with the criteria established by the workgroup and described in the NCHEMS report
- Collect information on the outcomes, progress, and learning to share with the assessment team once a year to support ongoing learning and adaptation

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Jesse Peters

Western Oregon University President

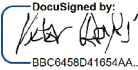
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H. American Association of University Professors (AAUP)

AAUP Oregon represents faculty and graduate employees at four of Oregon's seven public universities, including the Oregon Institute of Technology and Portland State University. Our members have dedicated their professional lives to the success of their students and the advancement of knowledge for the greater good of society. They also care deeply about the success and stability of Oregon's public university system, and we believe that this project is necessary to ensure that future generations of students will continue to have access to high quality public university education across the state.

AAUP commits to the following:

- Support and advocate for the Project within their professional and personal networks, whenever an opportunity arises to do so with individuals or organizations in a position to offer assistance
- Commit staff time to actively participate in the assessment team to review the proposals of other TRU+ universities and collaborative projects
- Review information on the outcomes, progress, and learning to share with the assessment team once a year to support ongoing learning and adaptation

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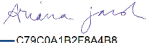
Victor Reyes
Executive Director

I. American Federation of Teachers (AFT)

AFT-Oregon represents full & part-time faculty and graduate employees across the TRU+ universities, including Western Oregon University, Eastern Oregon University, and Portland State University. We are deeply committed to ensuring that there are meaningful and sustainable investments into our regional public universities, and that these investments benefit the workers who make these institutions function, who are our members. We believe that there needs to be a coordinated and collaborative effort across our schools, unions, and governing bodies to create successful funding plans for a stable future for higher education in our state

AFT commits to the following:

- Support and advocate for the Project within our professional and personal networks, whenever an opportunity arises to do so with individuals or organizations in a position to offer assistance
- Review information on the outcomes, progress, and learning to share with the assessment team once a year to support ongoing learning and adaptation

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Ariana Jacob
President

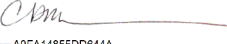
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J. Interinstitutional Faculty Senate (IFS)

The Interinstitutional Faculty Senate is the shared faculty governance body for Oregon's public universities and includes representatives from the Faculty Senates of each of Oregon's public universities. The IFS appreciates the important work done by Oregon's technical and regional universities in providing access to affordable regional higher education to our state's student population. It is vital that we support the ongoing financial viability of Oregon's institutions of higher education, and equally important that we maintain support for the success of our faculty, staff, and student populations. This project is the beginning of a longer conversation on ensuring both student and institutional success for all of Oregon's TRUs. The IFS supports this project and will remain engaged throughout the review process and any future discussions.

IFS commits to the following:

- Support and advocate for the Project within their professional and personal networks, whenever an opportunity arises to do so with individuals or organizations in a position to offer assistance
- Commit staff time to actively participate in the assessment team to review the proposals of other TRU+ universities and collaborative projects
- Review information on the outcomes, progress, and learning to share with the assessment team once a year to support ongoing learning and adaptation

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Christopher Walsh
President

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K. Oregon Student Association (OSA)

The Oregon Student Association represents and advocates for students at Oregon’s public universities and community colleges — including at Oregon’s Technical and Regional Universities (TRUs). Oregon’s TRUs discharge a unique and essential role in ensuring Oregonians have access to post-secondary education. Not only do TRUs offer a supportive and accessible environment for thousands of Oregonians - many first-generation, rural, or underserved - but the university campuses also have a profound impact on the communities in which they are situated. This collaborative effort and the TRUs sustainability funding will be critical in helping these institutions find their footing again after enrollment declines and funding shortfalls.

OSA commits to the following:

- Support and advocate for the Project within their professional and personal networks, whenever an opportunity arises to do so with individuals or organizations in a position to offer assistance
- Commit staff time to actively participate in the assessment team to review the proposals of other TRU+ universities and collaborative projects
- Review information on the outcomes, progress, and learning to share with the assessment team once a year to support ongoing learning and adaptation
- Engage students in assessment and feedback processes, when appropriate or necessary.

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Nick Keough

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Nick Keough

Legislative Director

2/9/2024

L. Service Employees International Union (SEIU)

SEIU represents classified employees at all seven of the public universities. Our members help carry out the administrative duties of the institutions, feed and advise students, and keep facilities clean. They are some of the lowest paid workers at these institutions, but play an immensely critical role in ensuring that institutions continue to run and serve Oregon students. This project has been a great opportunity to collaborate with other labor/advocate organizations as well as the institutions themselves and we look forward to continuing these conversations in the future.

SEIU commits to the following:

- Support and advocate for the Project within their professional and personal networks, whenever an opportunity arises to do so with individuals or organizations in a position to offer assistance
- Commit staff time to actively participate in the assessment team to review the proposals of other TRU+ universities and collaborative projects
- Review information on the outcomes, progress, and learning to share with the assessment team once a year to support ongoing learning and adaptation

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David Ramos
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David Ramos

Political and Public Strategist

VI. Appendices

Appendix A: Workgroup roster

Appendix B: Collaborative project concepts

Appendix A: Workgroup Roster

TRU+ 25M Sustainability Funding Project

Work Group Roster: Last updated 1/20/24

The following is a list of Workgroup members. Members are highlighted in yellow. Members were nominated by HECC and the TRU+ universities based on their preferences and the recommendations of Oregon Solutions.

Workgroup Organizations	First Name	Last Name	Title
TRU+ Universities			
Eastern Oregon University			
	Peter	Geissinger	Interim Provost
	LeeAnn	Case	VPFA
	Colleen	Cascio	VPSA
	Bennie	Moses-Mesubed	AVP Diversity, Equity, Inclusion and Belonging
	Tim	Seydel	VP University Advancement
Western Oregon University			
	Jose	Coll	Provost
	Tina	Fuchs	VPSA
	Ana	Karaman	VPFA
	Dominique	Vargas	Executive Director Diversity, Equity and Inclusion
	Ricardo	Lujan Vallerio	Director Government Relations
Oregon Institute of Technology			
	Johanna	Mott	Provost
	Abdy	Afjeh	Associate Vice Provost
	John	Harman	VPFA
	Mandi	Clark	AVP Student Affairs
	Dan	Peterson	Dean Health, Arts and Sciences
	Jennifer	Wilson	Executive Director of Diversity, Inclusion and Cultural Engagement (DICE)
	Kimberly	Koops	AVP Government Affairs
	Cassidy	Kotter	Assistant Director Government Affairs
Portland State University			
	Sheila	Martin	VP Public Affairs and Chief of Staff
	Andria	Johnson	VPFA
	Shelly	Chabon	Interim Provost and Chief Academic Officer

	Chuck	knepfle	VP Enrollment Management
	Ame	Lambert	VP Global Diversity and Inclusion
	Eric	Noll	Government Relations Manager
	Alyson	Kraus	Director of State Government Relations
Southern Oregon University			
	Sue	Walsh	Provost
	Neil	Woolf	Executive VP
	Jon	Chavez Baez	AVP Diversity, Equity and Inclusion
	Jeanne	Stallman	AVP Government Affairs
	Rob	Patridge	General Counsel
	Carrie	Vath	Dean of Students
HECC			
	Ben	Cannon	Executive Director
	Veronica	Dujon	Director, Academic Policy and Authorization
	Jim	Pinkard	Dir, Office of Postsecondary Finance and Capital
	Ramona	Rodamaker	Deputy Executive Director
	Kayla	Winslow	Finance Analyst
	Kyle	Thomas	Director of Legislative and Policy Affairs
	Rudyane	Rivera-Lindstrom	Director of Diversity Equity and Inclusion
Student, Staff, Faculty Organizations			
SEIU	David	Ramos	Political and Public Strategist
AAUP	Ramin	Farahmandpur	PSU AAUP VP of Political and Legislative Action
AAUP	Victor	Reyes	Executive Director
AAUP	Chris	Parta	Government Relations
AFT	Andrea	Haverkamp	Political Organizer
Oregon Student Association	Nick	Keough	Legislative Director
Interinstitutional Faculty Senate	Christopher	Walsh	President
Workgroup Supports			
NCHEMS	Sarah	Pingel	Vice President
	Brian	Prescott	President
Oregon Solutions	Camille	Preus	Convener
	Bobby	Cochran	Project Manager
	Nujhat	Ahmed	Project Manager

Appendix B: Ongoing Collaboration toward Financial Sustainability

From the first meetings, the workgroup emphasized A) collaboration, and B) meaningful engagement with students, staff, and faculty as critical parts of building financial capacity, and in turn, long term financial sustainability. Basically, campus buy-in for change and shared actions is the essential ingredient for transformation that will take time and need to be adaptive. The workgroup incorporated these principles of collaboration and meaningful engagement into the investment framework in several ways:

- Asking that all decisions foster collaboration across the TRUs, and not competition for scarce resources;
- Including meaningful campus engagement with students, staff, and faculty as an eligibility criterion for any investment with these funds; and
- Chartering the workgroup with Oregon Solutions where decisions would be based in consensus-seeking.

The collaborative process used to build this investment framework also led to the following recommendations for A) ongoing collaboration, and B) recommended allocations for collaborative investments.

B.1. Recommended Allocations in Collaborative Investments

The workgroup recommended allocating up to \$2.5 million in Tranche 2 funds to collaborative investments to A) take pilot actions that benefit all five TRU+ universities, and B) craft a Roadmap/Big Look that would continue to identify transformative strategies to achieve financial sustainability collectively across the five TRU+.

B.1.1 Selecting Collaborative Pilot Projects

The workgroup identified a list of 24 potential pilots at its August 2023 meeting, and an additional YY project through its campus-level engagements in October-November 2023. From those 24 + YY projects, the workgroup narrowed down to the list of priority projects in Table B.1.1. Below. Each project focuses in one of the four strategic investment areas. If selected, each project would be implemented across all five TRU+.

Table B.1.1. Priority Collaborative Projects from the November 16, 2023 work group meeting (there may be additional collaborative project ideas that emerge from campus engagement or other conversations)

Project short titles	Project description (FROM 11/16/23 NOTES)
<p>Enrollment: A student enrolled in one university can take courses in the other universities</p>	<p>INSERT MORE</p>
<p>Administrative Services and Efficiency: Develop shared administrative services across universities: A) Low-hanging fruit (e.g., joint procurement, shared subscriptions), and B) Shared IT services across the universities</p>	<p>Review opportunities for leveraging resources among the universities. Concepts have included shared purchasing power for equipment, office supplies, etc., improving workflows by learning best practices from each campus, utilizing similar software packages, where best to add resources and how universities can support each other during times of expansion and/or contraction.</p> <p>Technology systems provide a backbone for daily operations and greatly impact the student experience. Certain software packages offer proven benefits in improving student retention. The State has recognized the increasing role of technology as critical infrastructure, including allowing technology systems to be eligible as capital projects. However, the rubric for public university capital projects does not yet account for this and TRU institutions are not able to afford the significant investment required for any major system transition. As campus software systems fray, our ability to easily share information and collaborate across campuses is threatened; our ability to attract, recruit and retain students is significantly weakened as they encounter systems that are clunky, patched together, and based in 1980s technology if they are online at all. A workgroup of our IT officers could help catalog individual institutional weak points for investment, and collaborative opportunities which would support our ability to partner.</p>
<p>Enrollment: Grow dual credit course</p>	<p>Develop a strategy/pathway to expanding opportunities aimed at</p>

<p>opportunities for high school students and their future enrollment in community colleges and universities</p>	<p>providing a seamless path to a public university degree for Oregon high school students enrolled in dual credit programs, with an emphasis on students from historically underrepresented backgrounds in higher education, including rural students. Dual credit courses are taught by a high school teacher who is qualified to act as a proxy faculty member for an Oregon community college or public university when teaching the course. These courses are sufficiently similar to enable the student to be described as “taking a course” from a postsecondary institution, but are typically more affordable than university courses, often ranging in cost from \$0-\$50/course.</p>
<p>Student Success and Retention: Improve transfer pathways between community colleges and the universities</p>	<p>Oregon has passed legislation in recent years requiring that institutions of higher education (community colleges and universities) find transfer degree pathways for students to pursue. The goal has been to ease the complexity for students wanting to advance their education post community college and decrease their costs as more credits may be accepted at four-year institutions. Regional universities are uniquely situated to create more intimate relationships with their respective community college partners in their region to streamlining dual enrollment/ transfer opportunities. TRU+ institutions have the opportunity to use sustainability funds to resource an initiative that will allow our academic affairs departments to work closely with their counterparts at community colleges and create pathways beyond the AAOT, ASOT, IGETC, CSUGE, and more. Furthermore, CC and TRU+ institutions can take it a step further in K-12 advertisement of these pathways and sharing enrollment resources to provide students taking advantage of these opportunities to stay in touch with their regional CC and TRU+ institutions.</p>
<p>Enrollment: More direct and co-admissions for students into all five universities (and community colleges where it makes sense)</p>	<p>Convene a workgroup of university admissions officers to explore opportunities and challenges associated with a shared direct admissions portal. The workgroup will assess potential direct admissions strategies and identify various paths to and</p>

	<p>estimated costs with implementation. The group will also consider potential pilot direct admissions programs. As background, Oregon Tech and PSU currently utilize the Niche platform to allow students to be directly admitted. State leaders are interested in seeing these five institutions pilot direct admissions. A cost effective pilot program could be realized by expanding Niche utilization to include SOU, WOU and EOU.</p>
<p>Student Success and Retention: Move from quarter to semester systems</p>	<p>Oregon public universities and community colleges are on the quarter system. Upwards of 95 percent of colleges and universities in the United States are on a semester system, which generally consists of two 15-week terms with a winter break, versus three shorter 11-week terms. Semester schools usually begin in September and end in May, whereas quarters wrap up in June. Researching the benefits and opportunities for the TRUPs to switch to semesters would help inform benefits for student success.</p>
<p>Revenue: 2025 SSCM revisions</p>	<p>Planned review of the formula in 2025; Use portion of this report to inform the review?; Mission support- regional and research; Challenge: The formula doesn't allow for up front investments with long term return (expansion/investment in programs in order to get more funding in the long term)</p>

B.1.2 The Roadmap/Big Look

The workgroup prioritized an investment in a “Roadmap” (also called a “Big Look”)--a way to continue identifying strategies that could transform the TRU’s financial capacity and achieve long term financial sustainability. That Roadmap/Big Look could continue crafting collaborative actions that the workgroup did not have time to investigate fully in the four months it met to develop this investment framework.

Table B.1.2. Some trends to watch (from a conversation with Cam, Bobby, and Mark Mitsui- former PCC President on 12/21/23)

- In 2025, the [Carnegie Classifications](#) are updating their definition of an R1 university and overall including an emphasis on economic mobility. What is the opportunity for Oregon to be a national leader in “Equitable economic opportunity and sustainable development with an emphasis on making the most of local talent.”?
- [Better datasets](#) are critical to A) to take more strategic actions and adapt quickly, and B) communicate higher education outcomes to future students and the public. Some of these data might include i) predictive demographic analysis, ii) high resolution, regionalized, and disaggregated data by geography, race/ethnicity, age, college background, and reading/math skill, iii) [required skills for jobs and career paths](#)—both skills with short-range value, and with long-range value as AI and automation continues to change the nature of work, iv) who is competing for 18yr olds (e.g., military, industry, trades)
- Continued differentiation to serve adult learners ([especially those with some college, no credential](#); and those with Level 1-2 literacy levels). Currently Adult ESL programs can only serve 1M of the 43M Level 1 literacy adults in the United States. Most of these learners go to community colleges, but there could be better pathways into the TRUs
- Continue to make [transfers seamless](#), especially for these Level 1-2 literacy learners
- Address “credential confusion”. [There are over 1M credentials](#)- help consumers understand the value of these credentials, and make sure the TRUs offer the ones with market value
- Address the “basic needs insecurity” of students—especially housing, childcare, and food; and especially for adult learners. 50% of college students experience some form of insecurity. This could include navigator programs, or expansion of programs like STEP (i.e., better partnerships between TRUs and DHS/HHS, other service providers, and CBOs).
- [For skills](#) with a “short value life” (i.e., exposed to automation)- Consider providing shorter programs to meet short-term demands (e.g., 8 week programs)
- K-12 student populations are likely to be small and less academically prepared—Need to consider more developmental education approaches in higher ed?
- Continue building out non-academic pathways (i.e., the nature of jobs is changing fast, and students need a way to ‘re-tool’ quickly. Be clear about the skills that are short-term (and meet those with short-term programs) and ones that are immutable (and meet those with core courses/education). Some of those immutable skills are problem-solving, critical thinking, communication

across differences, collaboration, and learning how to learn. These skills do assume a basic level of literacy and numeracy that we need to make sure are met.

- There may be some barriers in current funding that allow universities to meet the needs of lower skilled students (i.e., paying for basic literacy and numeracy and developmental courses).
- Need try and calculate the “social return on investment” for higher education and these projects. For example, increased retention lowers costs (MDRC’s 2005 evaluation of CUNY’s ASAP program).